EXTERNAL EVALUATION FOR MISSION EFFECTIVENESS

In high-performance organizations:

- Leaders **complement internal monitoring with external evaluations conducted by highly skilled, independent experts.**

- Leaders commission external assessments to **learn more about how well their programs are being run, what these programs are or are not accomplishing, who is or is not benefiting, and how the programs can be strengthened.** Leaders do not use external assessments as a one-time, up-or-down verdict on the organization's effectiveness.

- Leaders recognize that there are many different types of external assessments, and **no one type is right for every organization or for every stage of an organization's development.** Independent evaluators who understand how different methodologies fit different contexts can help leaders **match the tool to the task.**

- Leaders draw a clear distinction between outputs (e.g., meals delivered, youth tutored) and outcomes (meaningful changes in knowledge, skills, behavior, or status).

- Those who are working to improve outcomes **commission evaluations to assess whether they are having a positive net impact.** In other words, they want to know to what extent, and for whom, they're making a meaningful difference *beyond what would have happened anyway.*

- Leaders who plan to expand significantly any programs aimed at improving outcomes have **a special obligation to commission a rigorous evaluation that can assess net impact.**

- Even those leaders who commission the most rigorous of impact evaluations do not stop there. They **commission additional assessments to gauge their impact in new settings** (or for new populations) and achieve greater positive impact for the money they spend.

- Leaders **share the methodology and results of their external assessments** to help others learn and avoid mistakes.

Note: We crafted this pillar with a special focus on organizations that provide services, but we believe the core concepts are relevant for other types of nonprofits as well—from those that advance human rights to those that protect ecosystems.

GLOSSARY

This glossary provides explanations of terms we used in this pillar. While not exhaustive, it includes terms that may have multiple meanings, due to different perspectives.

Evaluation – The systematic assessment, usually conducted by outside experts, of an organization's attempt to produce significant change through intentional actions. For information on the two key types of evaluations, see "Formative evaluation" and "Summative evaluation" below.[1]

Formative evaluation – An evaluation organizations commission to help them improve the performance of a program while it is underway. Also called *process evaluation*. Formative evaluations can be designed to assess any of the following aspects of program delivery: the quality of internal data; the fidelity of a program to its model; how well a program is recruiting and enrolling the population for which it is designed; program utilization, program completion, and participant engagement; and which clients achieve the intended outcomes, which do not, and which exit the program prematurely.

Outcomes – Socially meaningful changes for those served by a program, generally defined in terms of expected changes in knowledge, skills, attitudes, behavior, condition, or status. For example, a tutoring program might define its intended outcomes as measurable improvements in reading and math skills.[2]

Summative evaluation – Evaluation of a program in its later stages or after it has been completed to (a) assess its impact (b) identify the factors that affected its performance (c) assess the sustainability of its results, and (d) draw lessons that may inform other interventions. Summative evaluations are almost always performed by outside experts.[3]

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[1] Adapted from Hunter, David E. K. (2013). *Working Hard and Working Well: A Practical Guide to Performance Management for Leaders Serving Children, Adults, and Families.* Hartford CT: Hunter Consulting.

[2] Adapted from Morino, M. (2011). *Leap of Reason: Managing to Outcomes in an Era of Scarcity.* L. Weiss & Collins, C. (Eds.). Washington, DC: Venture Philanthropy Partners, in partnership with McKinsey & Company.

[3] Adapted from USAID (2009). *Glossary of Evaluation Terms.* Washington, DC: Planning and Performance Management Unit, Office of the Director of U.S. Foreign Assistance, United States Agency for International Development. Retrieved from http://pdf.usaid.gov/pdf_docs/Pnado820.pdf