

Designing an Evaluation Operating System

Effective evaluation isn't just about collecting data or writing a final report, especially when working as a team or across an organization. To do this well means building an evaluation operating system. This can range from thoughtfully designed workflows and documentation to organizational structures to help teams collaborate more effectively, preserve institutional knowledge, and create a foundation for continuous learning and improvement. **The purpose of a system is not simply to organize work. It is to create the conditions for people to do their best work together.**

PURPOSE

- Understand the essential components of an effective evaluation system
- Assess strengths and gaps in your current evaluation infrastructure
- Identify practical improvements to strengthen organization and consistency
- Learn approaches for structuring folders, workflows, documentation, and knowledge management

Use This If You...

- Are building or expanding an evaluation department or firm.
- Manage multiple evaluation projects or grants.
- Want to improve collaboration across staff or consultants.
- Spend too much time searching for files or recreating documents.
- Need more consistent documentation and project management practices.
- Want evaluation knowledge to live across the organization as opposed to with an individual.



ABOUT BSRI

BSRI was created to support informed and effective decision-making for our partners with tools, resources, and data for action. As we wind down operations, we are creating these resources for the community to continue the work. We use our guiding principles in engaging with partners and communities, putting people first through accountability and reciprocity, communicating transparently, and sharing our knowledge widely.

ABOUT THIS DOCUMENT

This guide was developed by BSRI based on our experience designing evaluation systems that support complex, multi-partner initiatives across public health, education, government, nonprofit, and research settings. While evaluation methods often receive the most attention, we have found that the systems surrounding the work are equally important to long-term success.

Rather than prescribing a single approach, this guide presents a “designer’s perspective” with design questions and adaptable examples for building evaluation systems that are organized, collaborative, and sustainable even as projects, staff, and organizational needs evolve.

The goal is not simply to become more efficient as an organization, but to build systems that make collaboration easier, preserve organizational knowledge, reduce unnecessary effort, and support continuous learning over time. By implementing even a few of the strategies outlined here, organizations can create evaluation environments that are easier to navigate, more resilient to change, and better equipped to generate meaningful insights that inform decision-making and strengthen impact as a team.

USE OF ARTIFICIAL INTELLIGENCE (AI)

Our organization utilizes artificial intelligence (AI) tools to enhance efficiency, support data analysis, and strengthen evaluation practices. We also encourage our partners and clients to thoughtfully explore AI as a means to build future-ready evaluation capacity. All AI use is governed by strict data privacy and ethical standards. We do not input any personally identifiable information (PII), protected health information (PHI), or other sensitive data into AI systems in a manner that would violate HIPAA or other applicable privacy regulations. Additionally, we exclusively use licensed AI tools and platforms that explicitly prohibit the use of submitted data for model training or retention beyond the scope of the intended task. This ensures that all information remains confidential, secure, and protected.

INTRODUCTION

Evaluation is inherently complex. From project planning and stakeholder engagement to data collection, analysis, reporting, and project closeout, successful evaluations depend on people, processes, information, and decisions working together seamlessly. While individual tools and workflows are important, it is the system they create together that ultimately shapes how effectively an organization delivers its work.

An **evaluation system** is the collection of structures, processes, tools, and practices that support the planning, implementation, management, and continuous improvement of evaluation work. It includes everything from project management workflows and folder structures to documentation standards, communication practices, knowledge management, quality assurance, and organizational learning. While these components may seem independent, together they create the operational foundation that enables evaluations to be delivered consistently, collaboratively, and effectively.

At BSRI, we believe evaluation systems should be designed with the same level of intentionality as the evaluations themselves. Well-designed systems reduce unnecessary effort, improve collaboration, preserve organizational knowledge, and create a strong operational foundation that supports both project quality and organizational capacity over time.

As you work through this guide, we invite you to put on a different hat: that of a **systems designer**.

Systems designers don't begin by asking, *"What folders do we need?"* or *"What template should we use?"* Instead, they ask:

- How do we want people to experience this work?
- How will people collaborate throughout the evaluation lifecycle?
- How will knowledge be captured, shared, and preserved?
- How will our systems evolve as we learn?
- How will our systems remain adaptable?

Every workflow, template, folder structure, meeting, and documentation practice is a design decision. Together, these decisions shape how people experience evaluation both within an organization and as external partners.

The questions that follow are designed to help you step back, view your evaluation systems through a systems thinking lens, and intentionally design the conditions that enable people, partnerships, and

organizations to learn, collaborate, and create meaningful impact long-term. Rather than prescribing a single model or set of best practices, these questions encourage you to think critically about how your systems support the people who use them, the work they are trying to accomplish, and the organization's ability to learn and adapt over time.

Throughout the guide, you'll find practical examples drawn from our experience designing evaluation systems across nonprofit, public health, government, education, and research settings. These examples are not intended to be copied exactly. Instead, they are meant to illustrate principles that can be adapted to fit your organization's unique context, culture, and goals.

Whether you are building a new evaluation team or strengthening an existing one, we hope this guide helps you design systems that make evaluation work more organized, collaborative, sustainable, and ultimately, more impactful.

BSRI'S FIVE DESIGN QUESTIONS

1. How can our systems help people do their most meaningful work?

Why this matters

Every system creates an experience for the people who use it. Evaluation systems are no exception. Whether it's a folder structure, project management workflow, documentation process, or meeting cadence, the way work is organized influences how easily people can collaborate, find information, make decisions, and contribute their expertise.

At BSRI, we believe systems should be intentionally designed with people in mind. Thoughtfully designed systems create clarity, reduce unnecessary effort, make collaboration more intuitive, and help people focus on meaningful work rather than navigating time-consuming processes. Conversely, unclear or inconsistent systems can lead to confusion, duplicated effort, frustration, and knowledge becoming isolated with individuals rather than shared across teams.

Our goal was never simply to organize information. Instead, we aimed to create an environment where people could do their best work together. We found that improving our efficiency was a welcomed by-product of leading with this sentiment.

What this looks like in practice	Questions to ask yourself when building your system
- Creating intuitive project structures that are easy to understand and reduce time spent searching for information. - Standardizing recurring processes while leaving room for professional judgment. - Documenting decisions so knowledge remains both within the organization and up to date for everyone contributing to a project team. - Designing workflows that support collaboration rather than siloes. - Making expectations visible through clear team member roles and responsibilities, templates, and workflow checklists. - Periodically refining systems based on team feedback and changing project-level or organizational needs.	- If a new team member joined tomorrow, could they quickly understand how work is organized? And find what they need to succeed in their role each day? - If an experienced team member left tomorrow, what knowledge would leave with them? - Are multiple people approaching or completing the same task in several different ways? - Which recurring processes and tasks could be simplified or standardized? - Do you have a platform where your team can easily access these? - Where do people spend time managing work instead of doing meaningful work? - Does your infrastructure solely rely on people to use their best judgment or, on the other side of the continuum, create unnecessary requirements?

2. How can our systems make collaboration intentional?

Why this matters

Evaluation is inherently collaborative. From project planning and instrument development to data collection, analysis, interpretation, reporting, and dissemination, meaningful evaluation depends on multiple people contributing different forms of expertise. Whether working with internal staff, clients, community partners, or external consultants, successful evaluation requires shared understanding, coordinated workflows, and clear communication throughout the project lifecycle.

At BSRI, we believe collaboration should be intentionally designed into evaluation systems. Project management structures, communication norms, documentation practices, and decision-making processes create the conditions for multidisciplinary teams to work together effectively while maintaining consistency across projects.

Our goal was never simply to coordinate tasks. It was to create an environment where evaluators, researchers, facilitators, analysts, and partners could contribute their expertise while maintaining a shared understanding of project goals, decisions, and progress to move projects forward together.

What this looks like in practice	Questions to ask yourself when building your system
- Establishing project workflows that align with each phase of the evaluation lifecycle. - Clearly defining roles and responsibilities across project management, qualitative and quantitative data collection, analysis, reporting, and client communication. - Establishing communication norms for meetings, updates, and project documentation. - Using shared project management systems to coordinate deliverables, timelines, and responsibilities and making them visible to everyone involved. - Documenting key decisions and client feedback throughout the project so all team members have shared context. - Creating structured opportunities for cross-disciplinary mentorship, problem-solving, and interpretation of findings. - Maintaining transparent and bi-directional communication with clients and community partners throughout the evaluation.	- Can every team member easily understand who is responsible for what? - Where does collaboration rely on informal conversations rather than shared systems? - Are important project decisions documented and accessible? - How easily can someone understand the status of a project without asking another person? - Where does your system unintentionally create silos? - In certain instances, is your system set up for external collaborators to plug in (e.g., partners and community collaborators)?

3. How can our systems make knowledge visible and accessible?

Why this matters

Evaluation projects generate a wide range of information throughout a project's lifecycle. Survey instruments, interview guides, data dictionaries, analytic plans, codebooks, meeting notes, facilitation materials, reporting templates, methodological decisions, and client/funder communications all contribute to the integrity and continuity of the work.

Well-designed knowledge management systems make evaluation materials easy to locate, understand, and use throughout a project while preserving continuity across staff, clients, and future initiatives. We

also believe that when these systems are functioning well, they contribute to your organization's growing knowledge base and inform increasingly effective evaluation practices over time.

What this looks like in practice	Questions to ask yourself when building your system
- Organizing evaluation assets using consistent folder structures and naming conventions. - Maintaining shared libraries (or documents with easily accessible examples) for instruments, protocols, consent forms, codebooks, and reporting templates. - Documenting methodological decisions and project assumptions in a shared running notes document. - Creating SOPs, workflows, and/or shared files to discuss evaluation topics ranging from data collection procedures to analytic workflows. - Maintaining version control for surveys, interview guides, dashboards, reports, and other evolving deliverables. - Ensuring project information is organized so new team members can quickly understand the project's history and current status.	- Could another person on the evaluation team quickly locate the materials needed to continue this project? - Are evaluation instruments, protocols, and templates organized for future reuse? - Are methodological decisions documented alongside the work they informed? - How easy is it to distinguish current documents from outdated versions? - Does your approach to knowledge management create clarity across all project staff and partners?

4. How can our systems continue to learn and improve?

Why this matters

Building an effective evaluation system is not a one-time effort. As organizations grow, projects evolve, and new challenges emerge, systems must evolve alongside them to remain relevant and supportive. Continuous improvement requires intentionally creating opportunities to reflect on what worked well, identify opportunities for improvement, and translate those insights into better ways of working.

At BSRI, we believe organizational learning happens when reflection is embedded within everyday practice rather than reserved for the end of a project. By weaving intentional space for learning, whether quarterly, bi-annually, or annually, organizations can strengthen both the quality of their work and the systems that support it. This could look like carving out time within a project team or across

departments to reflect on workflows, documentation practices, project management approaches, or evaluation processes - what's working well? What stands to be improved? Where can we experiment?

Our goal at BSRI was never to build a 'perfect' system but rather to continue to hone it over time and remain agile as the needs of the team shifted and grew.

What this looks like in practice	Questions to ask yourself when building your system
- Conducting project reflections at key milestones and project closeout. - Updating SOPs, templates, and workflows based on lessons learned. - Gathering feedback from project teams, clients, and community partners about how your systems are functioning. - Identifying recurring challenges and translating them into process improvements. - Creating opportunities to share successful practices across projects and teams. - Testing and refining improvements before implementing them organization-wide.	- How does your organization capture lessons learned throughout a project? - When systems aren't working, how are improvements identified and implemented? - Are project reflections resulting in changes to your templates, workflows, or SOPs? - How are successful practices shared across teams? - Does every evaluation strengthen the way future evaluations are designed and managed?

5. How can our systems create consistency while remaining adaptable?

Why this matters

Each evaluation project brings its unique lens, whether it be different clients, communities, funding requirements, timelines, methodologies, or organizational contexts. While a consistent foundation is needed to support teams toward working efficiently and maintaining quality, overly rigid systems can limit innovation, responsiveness, and professional judgment.

We believe that our evaluation and organizational systems must remain flexible enough to meet the unique needs of each evaluation. Standardized processes reduce unnecessary decision-making, establish shared expectations, and improve quality across projects. At the same time, adaptable systems empower teams to thoughtfully adjust their approach when the context calls for it.

What this looks like in practice	Questions to ask yourself when building your system
- Standardizing core project structures (e.g., folder structures, key phases) while allowing project-specific adaptations. - Developing templates that provide consistency without prescribing every decision. - Establishing minimum documentation standards while allowing flexibility in methodology. - Creating repeatable workflows for common evaluation activities while recognizing that different projects may require changes to meet the needs of the project. - Using standard operating procedures as guides that evolve through experience rather than fixed rulebooks. - Empowering teams to exercise professional judgment while documenting significant deviations from standard practice when appropriate.	- Which parts of your evaluation process benefit most from standardization? - Where do teams need flexibility to respond to different communities, clients, or evaluation designs? - Are your standards supporting quality, or creating unnecessary administrative burden? - Can new projects be launched efficiently without forcing every project into the same mold? If not, where are the pain points? - When your team adapts a process, is that learning captured so it can inform future work?

APPENDIX

EVALUATION OPERATING SYSTEM BUILD OUT TOOLKIT

Are you starting to build out your operating system for the first time? See the checklist below for some tangible next steps.

Evaluation operating system checklist

1. Help people do their most meaningful work

This is about developing your “base level” infrastructure.

- ☐ Files: Develop your file infrastructure (e.g., standard project folder structures, naming conventions for files and folders).
- ☐ Templates: Build reusable project templates and save them in a folder the full team can access (e.g., reports, presentations, invoices, SOWs).
- ☐ Workflows: Define the phases and key steps in your recurring workflows + reduce duplicate or unnecessary steps.
- ☐ Who is doing what: Clarify team roles and responsibilities (e.g., build this into project role descriptions, professional work plans, job descriptions).
- ☐ Onboarding: Review whether new staff can quickly navigate your system + test with new hires.

2. Make collaboration intentional

At BSRI, we found that bringing together team members with an array of expertise led to strong products and outcomes.

- ☐ Communication: Establish project communication norms. (e.g., Slack; Microsoft Teams; Where and how often are you communicating? What are your unspoken communication norms, and do they match the experience you aim to create?)
- ☐ Map it Out: Define project roles across the evaluation lifecycle. (e.g., Build opportunities for cross-functional collaboration as an intentional choice)
- ☐ Project Management: Implement a shared project management platform and processes. (e.g., Choose a best-fit PM platform for your organization)
- ☐ Learn Side-by-Side: Include community partners where appropriate; Document client feedback in one shared location and discuss as a team.

3. Make knowledge visible and accessible

Project Knowledge:

- ☐ For each evaluation project, create shared documents and communication channels where up-to-date project information is housed. (e.g., meeting minutes, methodological decisions) This will ensure new staff can understand project history.
- ☐ Maintain version control. Note that Google Docs does this automatically.

Organizational Knowledge:

- ☐ Create documentation standards.
- ☐ Create SOPs for recurring evaluation activities.
- ☐ Organize SOPs, templates, instruments, etc., into a shared library.

4. Continue to learn and improve

Reflect:

- ☐ Schedule project reflections. (e.g., following the submission of a deliverable with the internal team)
- ☐ Conduct team retrospectives, or ‘project off-boarding reflections,’ to inform future evaluation projects.
- ☐ Gather client feedback regularly. (e.g., One time-point per year)

Act:

- ☐ Act on what is learned in the discussions above. (e.g., Update SOPs; test what you learned by making updates to a deliverable or process within a project or across projects and integrate what works well across your department or organization.)
- ☐ Document and share process improvements with your team.
- ☐ Review systems at least annually.

5. Create consistency while remaining adaptable

Create Processes:

- ❑ Standardize processes across projects (e.g., key phases) and decide what must remain consistent organizationally vs. where professional judgment should guide decisions.
- ❑ Develop adaptable workflows instead of rigid rules.
- ❑ Capture adaptations that worked well and scale across projects.

Create Items to Pull From:

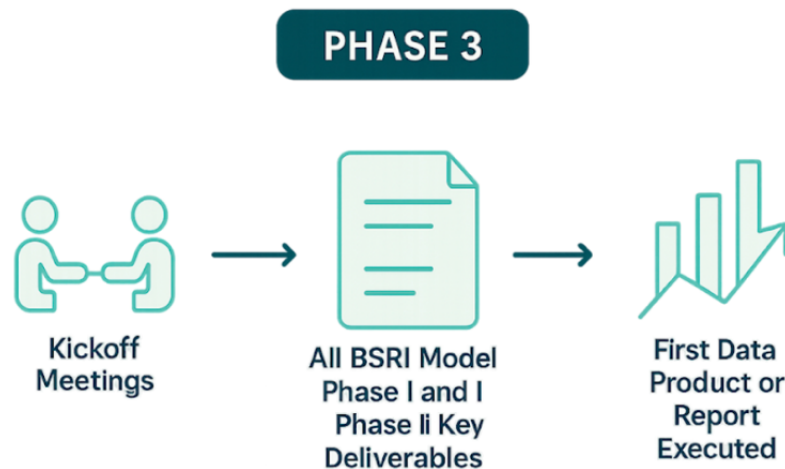
- ❑ Create a "starting point" for deliverables (e.g., sample reports, dashboards, protocols, workplans, data dictionaries) that can be adapted for future projects instead of recreated from scratch.
- ❑ Build reusable report templates at both project and organizational (or evaluation department) levels.
- ❑ Periodically retire outdated templates.

BSRI In Practice

Listed below are tangible applications for each of the questions posed above that we've executed throughout the years at BSRI.

1. Help people do their most meaningful work

Emotional Design Workflow: We intentionally designed each phase of our project lifecycle to ensure that our team and partners experience clarity, care, and momentum from start to finish. In practice, this looked like collaboratively defining the types of emotions we wanted to elicit from our team and clients, followed by designing key steps, templates, sample documents, meeting agendas, SOPs, and project management blueprints, which clearly defined roles and responsibilities to meet these needs. See an example of the key steps in Phase 3 of our project lifecycle below.



2. Make collaboration intentional

Project Management Architecture: We developed a project management SOP that outlined each aspect of our approach and worked collaboratively with our team to roll it out successfully. One section of this SOP provided clarity around project management roles and responsibilities as seen below.

Org PM Responsibilities by Role	Responsibilities
Individual	- Own day-to-day project management - Keep all tasks up to date in PM system (e.g., status, due date) and ensure that other team member task timelines are either not affected or also updated. - Share the outcome of project updates/changes in the project Slack channel so there is transparency and shared understanding amongst the project team. (e.g., If a decision is reached verbally or in private message share the outcome with the team in the Slack channel) - Add one-off tasks into PM system as needed and in communication with Project Lead. - Ensure all versions of project documents are in team drive folders (word and PDF versions)
Project Team	- Participate in new/annual contract PM meetings - Share the outcome of all project updates/changes shared in project Slack channel so that everyone is on the same page. - Lead all scheduling for the project (e.g., meetings, data collection) - Ensure all versions of project documents are in team drive folders (word and PDF versions). - Contribute to innovation / quality management documents and discussions.
Project Lead	- Lead new/annual contract PM meetings - Own day-to-day project management - Proactively manage and own all project components: - Deliverables completed within timeline and scope (e.g., Follow up on overdue tasks with individuals; communicate with the Dept's Director if not resolved.) - Manage and assign scheduling for the project (e.g., meetings, data collection) - Ensure project timelines in PM system are reflective of any updates made. - Management of new one-off tasks, as needed. - Communicating scope additions to EL and Ops Dept and subsequent addition of tasks.

Org PM Responsibilities by Role	Responsibilities
Project Management - Operations Department	Lead innovation / quality management discussions with the project team; share as needed with Ops Dept.
	- Get Blueprints ready for creativity discussion and review (PRE-new/annual contract PM meeting) - Attend New/Annual Contract PM Meetings - Integrate innovation infrastructure into deliverables workflows - Complete final review of tasks (e.g., descriptions, dependencies, milestones and deploy in live project spaces. - Add in additional SOW addendum workflows when requested by PL.
Director	- Manage the Department's core responsibilities, inclusive of strategic plan needs. - Own day-to-day project management - Manage department's workload: - Proactively planning one quarter ahead. - Managing 30 days ahead. - Address issues with overdue tasks. - Create blueprints for department-level annual processes.
Executive Leadership	- Own day-to-day project management of EL tasks/projects - Ensure key business functions are successfully met. - Client-facing project emotional design key milestones and deliverables. - Department projects (e.g., Strategic Plan). - Business Development. - Staffing & Professional Development. - Financials (e.g., Payments received). - Monitoring (e.g., TM-PREV).

3. Make knowledge visible and accessible

Project Hub: We developed a shared Project Hub (e.g., shared Google Doc with tabs) for each evaluation project that included all relevant quick-glance shared project documents. For our organization, this included the project charter, client intake & preferences, project running notes (e.g., project updates, meeting minutes, methodological decisions – see sample below), new/annual PM meeting notes, learning & development, and insights & innovations. This approach provided a structured space for all departments across our organization to support each project. Across these

document tabs, action items were documented in real-time rather than relying on memory, resulting in project knowledge remaining accessible to the full team while also providing the opportunity to scale learnings across the organization.

Running Updates

Date (MM/DD/YY) - Meeting Name

Attendees: XXXX

Action Item(s) <i>These will be translated into Tasks and Sub-Tasks in Wrike.</i>	Owner <i>This is who will be assigned in Wrike.</i>	Start Date	End Date	Need added to Wrike?
Name of task • Task description		MM/DD/YY	MM/DD/YY	Y/N

Meeting Notes

- Include project updates and important upcoming dates here.

4. Continue to learn and improve

Learning Organization Reflections: Rather than reserving reflection for annual retreats, we embedded short reflections throughout our calendar year across both our evaluation projects and our organization. In each instance, our team documented what worked well, what we wanted to change or test, and which insights and innovations were worth carrying into future projects. This allowed us to continuously improve our approach over time. See which timepoints worked best for our organization below.

Project-Level	
New Contract / Annual Contract Meeting	A proactive checkpoint where the team reflects on lessons learned either in prior projects or in the last year of the project and identifies opportunities for improvement or innovation at the start of a new contract or contract year. This sets shared expectations, aligns priorities, and embeds learning from the outset.
Deliverable Submission	Instead of surveys and check-ins, we will use these short reflection points after each deliverable is submitted to capture what worked well and what could be improved. These insights feed directly into ongoing project work and strengthen future work.
Internal Project Off-boarding	A closing retrospective at the end of each project to consolidate insights, document best practices, and flag areas for growth. Insights are shared across teams to inform future projects and organizational strategy.
Department-Level	
Department Meetings	Directors will lead these discussions in department meetings.
Org-Level	
Quarterly Systems-Level Reflections Post-Huddle	Cross-project reflections on a quarterly basis to share big-picture patterns and opportunities within and across departments. These discussions will “connect the dots” between individual and project insights and organizational strategy.

5. Create consistency while remaining adaptable

Streamline where possible: Instead of beginning every evaluation from a blank page, we developed reusable project blueprints in our project management system, report templates, and folder structures that served as starting points. Teams then adapted these resources to fit each project's unique methodology, partners, and goals. See examples of our folder structures below.

BSRI Team Drive > 4. Current Projects > - Sample Project Folder ▾

Ask Gemini
Summarize, analyze, and get up to speed with files in this folder.

Type ▾
People ▾
Modified ▾
Source ▾

Name ↑

1. Admin
2. Project Overview
3. Deliverables
4. Meetings
5. Data
6. Shared with
Sample Project Hub

BSRI Team Drive > 4. Current Projects > - Sample Data Folder Str... ▾

Ask Gemini
Summarize, analyze, and get up to speed with files in this folder.

Type ▾
People ▾
Modified ▾
Source ▾

Name ↑

Document Review
Focus Groups
Interview Guides
IPP
Merged Analysis
Site Observations
SPARS (FEDERAL)
Surveys