

Evaluation Decision Guide Document

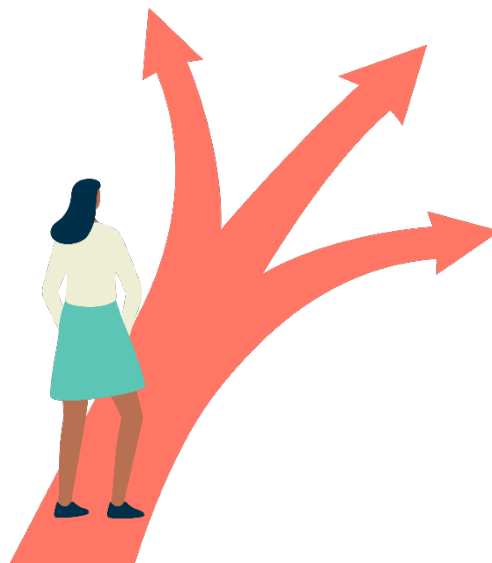
PURPOSE

This document is designed to support nonprofit and social impact organizations in making informed decisions about how to structure their evaluation and research functions. It provides a simple framework to help leadership teams assess their capacity, priorities, and goals to select the most appropriate evaluation model. Evaluation structure decisions influence not only how evaluation work is completed, but also how organizational capacity, staff responsibilities, and long-term learning systems are developed and sustained.

This document is not intended to provide legal advice or prescribe a single “right” approach. Instead, it offers a structured way to think through available options.

Use Case

- ▶ You are deciding how to approach evaluation (internally, externally, or a hybrid model)
- ▶ You are reassessing your current evaluation structure and considering a shift
- ▶ You are preparing for new funding or growth and need to determine how evaluation will be supported
- ▶ You are a leadership team seeking alignment on roles, investment, and expectations related to evaluation



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

BSRI developed this resource based on our experience supporting organizations across multiple evaluation models, including building internal teams, working with independent consultants, engaging full-service firms, and supporting minimum-capacity approaches.

We have observed that challenges in evaluation are rarely about tools or technical skills alone. More often, they stem from **misalignment between an organization's chosen model and its actual capacity to support that model.**

This framework is designed to simplify decision-making by focusing on one core question and a small set of practical considerations that leaders can use to guide their approach.

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.

HOW TO USE THIS RESOURCE

Start Here: One Core Question

Organizational Self-Assessment

Evaluation structure is not a neutral choice. It shapes how data is collected and used, the quality and consistency of reporting, staff workload and burnout risk, organizational learning and improvement, and long-term sustainability and funding competitiveness. Choosing a model that does not align with your capacity can lead to:

- ▶ Fragmented or inconsistent data
- ▶ Overburdened staff
- ▶ Missed opportunities for learning
- ▶ Compliance risks



Questions to Ask Before Choosing an Evaluation Model

Do we have the capacity to own and manage evaluation internally?

This question is not just about staffing. It includes:

- **Staff time and bandwidth** – Do we have staff who can realistically take on evaluation responsibilities without overextending their existing roles?
- **Budget** – Are there dedicated funds to support evaluation activities, training, tools, consultants, staff time, or a full-service evaluation partner?
- **Evaluation knowledge & technical expertise** – Do we have access to people who understand evaluation design, data collection, analysis, reporting, and learning?
- **Project management infrastructure** – Do we have clear processes for managing timelines, deliverables, communication, and accountability across the evaluation work?
- **Leadership readiness** – Are organizational leaders willing to use evaluation findings to guide decisions and adjust existing practices when needed?
- **Organizational culture of learning** – Does our organization value reflection, learning, and continuous improvement beyond funder reporting or compliance?
- **Ownership and accountability** – Is there clarity regarding who is responsible for overseeing evaluation activities, decision-making, implementation, and follow-through across the organization?

Your answer to this question (and the boxes you check off) will guide your path forward.

The Evaluation Model Continuum

Organizations typically fall into one of four approaches. These are briefly described below. If you aren't sure where you stand, take the short quiz in the [Appendix](#).

1. Build Internal Capacity: You hire or develop staff to lead evaluation in-house.

Best for organizations that:

- ▶ Have a budget and long-term commitment to provide training and mentorship to current staff, or to hire new staff with these skillsets.
- ▶ Want full ownership of data and systems and have the tools, technology, and infrastructure to build it out.
- ▶ Are considering organizational sustainability, succession planning, and/or the importance of knowledge retention.
- ▶ Want to build institutional knowledge and reduce reliance on external partners over time.
- ▶ Value deep integration with program strategy and have or can develop the internal pathways between data and decision-makers.

Tradeoff: Requires upfront investment and ongoing management.

2. Engage Consultants: You contract individuals for specific roles or projects.

Best for organizations that:

- ▶ Need specialized expertise and have defined parameters of what needs to be done.
- ▶ Want flexibility in scope and cost with a start date and end date in mind.
- ▶ Have internal capacity to manage multiple workstreams and integrate temporary team members.

Tradeoff: Requires strong coordination and clarity across contributors.

3. Hire a Full-Service Firm: You partner with one firm to manage evaluation end-to-end.

Best for organizations that:

- ▶ Want consistency and a unified approach to integrating data and evaluation processes into your organization.
- ▶ Prefer lower administrative burden to oversee deliverables and timelines.
- ▶ Value long-term partnership and strategic support on data-based decision-making at a program and an organizational level.

Tradeoff: Higher cost and less flexibility to swap individual contributors.

4. DIY / Minimalist Approach: You assign evaluation responsibilities to existing staff.

Best for organizations that:

- ▶ Have limited resources in the short term and are feeling stretched on strategic implementation.
- ▶ Need to maintain basic reporting and compliance to maintain existing funding.

Tradeoff: Often limited to outputs and compliance; strategic disadvantage to sustain long-term.

What Often Gets Overlooked

Across all models, success depends less on the structure itself and more on an organization's ability to:

- ▶ Clarification of roles and responsibilities
- ▶ Define deliverables and timelines
- ▶ Communicate consistently and create feedback loops
- ▶ Provide clear and tangible structure from leadership that demonstrates engagement and support
- ▶ Align values, approach, and expectations across individuals, teams, or organizations

Even the “right” model will struggle without these elements in place.

Common Pitfalls in Decision-Making

Sometimes, the most well-intentioned organizations make errors when considering their capacity and trade-offs. Organizations should avoid when possible:

- ▶ Choosing a pathway based on cost alone rather than capacity
- ▶ Overestimating internal bandwidth
- ▶ Underestimating coordination needs
- ▶ Assigning evaluation responsibilities without adjusting workload, role expectations, or available support
- ▶ Defaulting to DIY without a long-term plan
- ▶ Delaying decisions results in reactive or fragmented evaluation

A strong decision aligns resources, expectations, and purpose.

Final Considerations

There is no single best model for evaluation—only the model that best fits your organization right now. As your organization grows, your evaluation structure should evolve with it. The goal is not perfection—it is alignment:

- ▶ Alignment between capacity and expectations
- ▶ Alignment between structure and strategy
- ▶ Alignment between data and decision-making

When alignment is in place, evaluation becomes not only a tool for impact, but also a mechanism for organizational learning, staff growth, and continuous improvement.

Appendix

Evaluation Decision Quiz

Use this short quiz to identify which evaluation model may be the best fit for your organization right now. For each question, select the answer that best describes your organization. At the end, count how many A, B, C, and D responses you selected.

1. Staff Time and Bandwidth

- A. We have very limited staff time for evaluation.
- B. We have some staff time to coordinate specific evaluation tasks.
- C. We have, or are willing to create, dedicated staff time for evaluation.
- D. We have limited staff time and want an external partner to manage the process.

2. Budget

- A. We have little or no dedicated evaluation budget.
- B. We have limited funding for a specific consultant or project.
- C. We can invest in evaluation staff, tools, systems, or training over time.
- D. We can invest in comprehensive support from an evaluation firm.

3. Evaluation Expertise

- A. We mostly track basic outputs or reporting requirements.
- B. We need help with specific tasks such as surveys, analysis, or reporting.
- C. We have, or are ready to build, internal evaluation expertise.
- D. We need access to a broader team with evaluation, research, analysis, and reporting expertise.

4. Project Management Capacity

- A. We have limited systems for managing evaluation timelines and deliverables.
- B. We can manage a clearly defined evaluation project with outside support.
- C. We can manage ongoing evaluation work across programs or teams.
- D. We prefer one external partner to manage timelines, deliverables, and communication.

5. Evaluation Needs

- A. We mainly need basic tracking, simple tools, or funder reporting.
- B. We need support for a specific project, grant, or evaluation activity.
- C. We have ongoing evaluation needs and want to integrate evaluation into our work.
- D. We have complex, multi-program, multi-site, funder-facing, or high-stakes evaluation needs.

6. Use of Findings

- A. We mainly need evaluation for compliance or reporting.
- B. We want help interpreting findings for a specific project or program.
- C. We want to regularly use findings for learning, improvement, and decision-making.
- D. We want a partner who can help connect findings to strategy, reporting, and organizational learning.

7. Organizational Leadership and Change Readiness

- A. Evaluation findings are primarily used for reporting requirements.
- B. Evaluation findings are occasionally used to inform decisions.
- C. Leadership regularly incorporates findings into planning and decision-making.
- D. Leadership seeks strategic partnership to help drive organizational learning and change.

Scoring Your Results

Count your responses:

If you selected mostly...	Your organization may be best suited for...
A's	DIY / Minimalist Evaluation Approach
B's	External Consultant / Consultants
C's	Build Internal Evaluation Capacity
D's	Full-Service Evaluation Firm

What Your Score May Mean

Mostly A's: DIY / Minimal Evaluation Approach

This may be the best fit if your organization has limited resources and mainly needs to maintain basic reporting, tracking, or compliance. This approach may work in the short term, but it should be paired with a longer-term plan for strengthening evaluation capacity. Doing the bare minimum for too long comes with damaging consequences.



Need additional guidance on the minimal evaluation approach?

For a deeper look at the risks of staying in minimum mode — and what this federal moment is teaching us about building evaluation capacity, visit our impact hub to read **The Minimum Trap: What This Federal Moment Is Teaching Us About Evaluation.**

Mostly B's: External Consultant / Consultants

This may be the best fit if your organization has some internal capacity to manage evaluation but needs outside support for specific tasks, such as planning, tool development, data analysis, reporting, or facilitation.

Mostly C's: Build Internal Evaluation Capacity

This may be the best fit if your organization has the time, budget, leadership readiness, and long-term need to bring evaluation functions in-house.

Mostly D's: Full-Service Evaluation Firm

This may be the best fit if your organization needs comprehensive evaluation support, has complex evaluation needs, or wants to reduce the internal burden of managing the evaluation process.

If your results are mixed, your organization may need a hybrid approach or may be in transition between models.