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The social impact of social impact evaluation

Research summary

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Research Summary

Why was the research done?

Social impact evaluation is a booming practice and ideology in charitable organisations. Conceptually, it offers the promise of proving to funders and other stakeholders that an organisation or program is fulfilling its promise, while also identifying opportunities for improvement. Despite the highly virtuous image this presents, evaluations often do not end up fulfilling these purposes. Scholars also raise concerns about the direction evaluations may take programs, as when an evaluation defines what "good" performance is within the context of measurement, it also defines what "good" performance looks like into the future. Therefore, as Churchman (1971, p. 34) aptly put it, "the professions which try to place numbers on social change have the responsibility to go the entire way—to understand why the numbers make a difference and why the difference they make is the right difference.'"

What were the key findings?

This summary provides an overview of key contributions from the four empirical chapters of the thesis.

- The first paper (page 1) provides new insights into how the characteristics of service beneficiaries influence funding approaches and the choice of inspection and measurement methods.
- The second paper (page 2) analyses the approaches and methodologies adopted in the published evaluation reports. It identifies methodological issues that could hinder the overall effectiveness of these evaluations.
- The third paper (page 3) explores the emerging digital era of evaluation. It highlights key areas facing disruption, especially the evolving role of evaluators.
- The fourth paper (page 4) introduces a previously unexplored purpose of evaluation in the charitable sector: supporting advocacy efforts.

What does this mean for policy and practice?

These findings offer valuable insights for social service managers, funders, and practitioners, highlighting opportunities to improve quality assessment approaches that challenge rather than perpetuate social disadvantage. They also prompt the evaluation sector to reflect on the current trajectory of the field and consider if changes are needed.

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We acknowledge the Traditional Custodians of the lands on which we work and live across Australia. We pay our respects to Elders past and present and recognise their continued connections to land, sea and community.

The Inspection of Marketised Models: Audit, Evaluation, and Service Beneficiaries

Published now in [Nonprofit Policy Forum]

In today's world, it's hard to avoid being checked or inspected; society want to know if things work and if they could be working better (1). For social services, there is a range of different ways to inspect performance including evaluation, audit, certification, and outcomes measurement (1,2). This study explored how different types of inspection are used in social services.

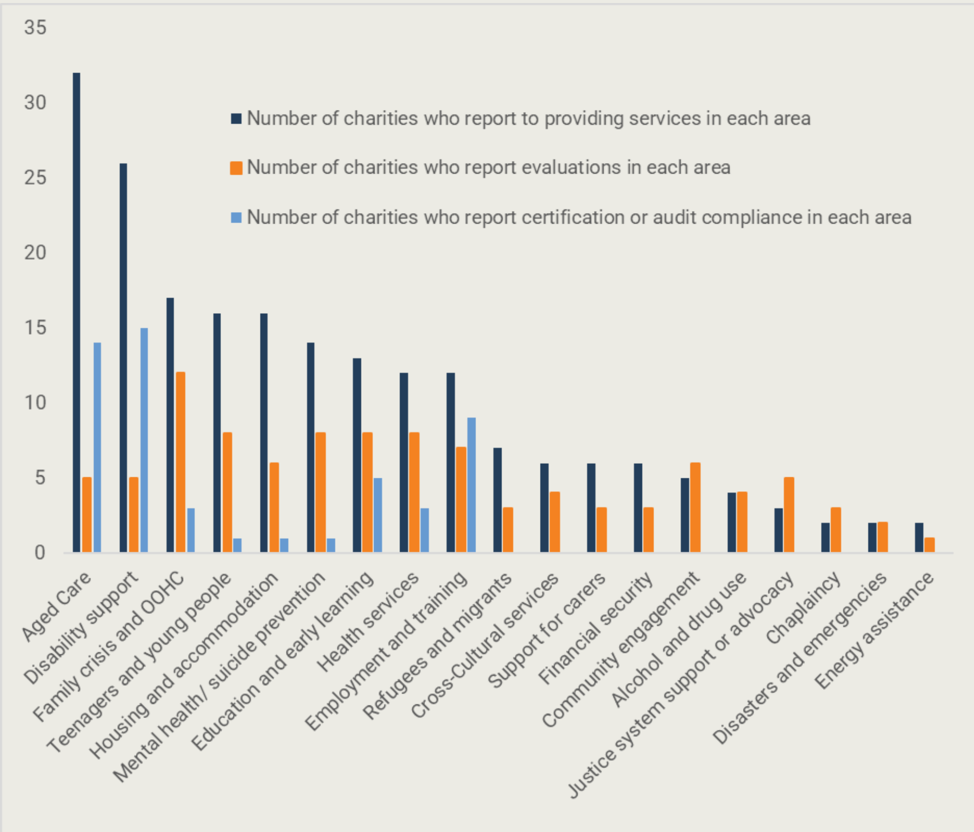
As demonstrated in the graph, we observed that while some charity websites contained multiple references to evaluation, others had none at all. Rather, these organisations that predominantly delivered disability support, aged care, out-of-home care (OOHC), employment and training, and health services, were subject to frequent audits.

Our interview participants commented that audited services operate under marketized funding models. In contrast, evaluated services are funded through short-term block grants, where the state retains financial risk, and there's no incentive to cut costs for profit.

However, there is also difference in the characteristics of the service recipients, as one participant described "marginalized groups" are targeted through the block grant programs, while as another described "less contentious programs" receive marketised funding.

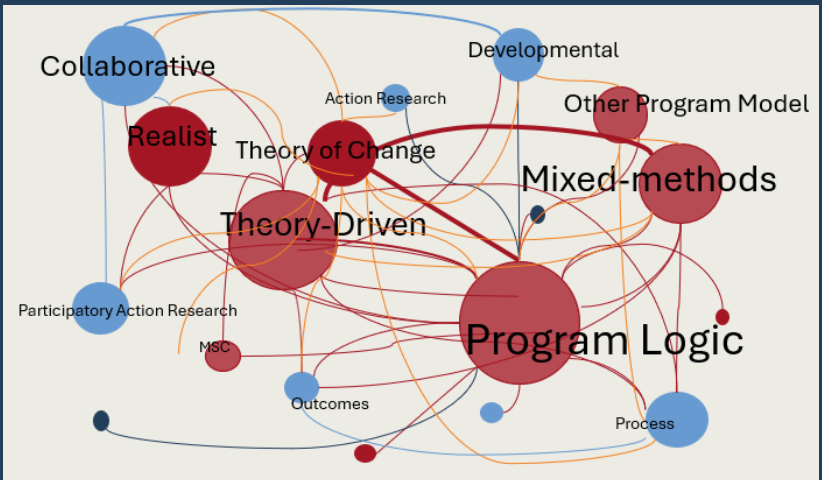
This presents a spectrum of services: on one end, widely accessible services seen as "deserving" of long-term delivery, which are marketized and audited for compliance; on the other, targeted interventions aimed at specific groups, often under greater scrutiny and funded short-term, where evaluations focus on their effectiveness in changing outcomes.

The "elephant in the room" is the recent wave of Royal Commissions into marketised services, highlighting the need for outcomes-focused measurement to prevent neglect and abuse. Participants noted that audits are now beginning to incorporate recipient perspectives, blending with evaluation methods that emphasize lived experience. Future research should examine this overlap.



Imprinting and the Evolution of Evaluation: A Descriptive Account of Social Impact Evaluation Methodological Practice

Published now in [Evaluation]



This research examined the adoption of evaluation approaches and methods in reports published by not-for-profit organizations. For evaluation practitioners, the challenge of navigating numerous approaches is well known. Vedung's influential work highlights how the evolution of these approaches reflects shifts in political and governance contexts, yet elements of earlier practices continue to blend into contemporary evaluation (3).

The study's key contribution was identifying the pervasive influence of theory-driven evaluation across various approaches. Among the 124 evaluation reports analysed, 116 explicitly identified an evaluation approach. Of these, 31 explicitly adopted the theory-driven approach or associated visual models. As well as being the most frequently adopted overall, theory-driven approaches were often used alongside other methods. The co-occurrence map above illustrates these overlaps.

The analysis of data collection methods revealed that structured or semi-structured one-on-one interviews were the most common, appearing in 115 instances, followed by quantitative surveys (62 instances) and focus groups (41 instances). Clients were the primary participants in surveys, while staff were more frequently involved in interviews and focus groups.

The findings underscore the enduring impact of theory-driven evaluation, particularly through visual models like theories of change and program logic frameworks. We argue that this sustained impact arises from theory-driven evaluation's combination of empirical rigor and practical utility, aligning it closely with neo-liberal values emphasizing managerial control. However, as noted by Ruff (2021), visual models often emphasize upward accountability and causal outcomes, narrowing how social programs are valued (4). This, in turn, shapes the social sector by favouring specific approaches to measuring social programs and, consequently, defining the types of programs that are deemed "good" or valuable within that framework.

While these models provide valuable structure, their influence can impose methodological constraints, potentially limiting the effectiveness or coherence of alternative approaches. For example, visual models commonly used in these evaluations may drive focus towards measuring numerous outcomes, often at the expense of robust causal analysis in quantitative methods and genuine participant co-construction in qualitative studies.

Digital-Era Evaluation: Automating and Reconfiguring Evaluation in the Social Service Sector

Published now in Evaluation

Given the pervasive role of digital technology in daily life, its integration into evaluation processes is unsurprising. This shift toward digital-era evaluation emerged clearly in 20 qualitative interviews with not-for-profit evaluation stakeholders. An additional five interviews with technology sector representatives explored their perspectives, while a discourse analysis examined how radical or evolutionary this change appears to be.

The analysis of this data pointed to three core points of change occurring through digital-era evaluation.

1. Replacing External Evaluators

There was a high level of dissatisfaction with external evaluators expressed in the interviews, however, this dissatisfaction is not new. External evaluators have long been seen as learning the most from the process, while being too detached from the program to drive meaningful improvements. Digital technology is addressing this by offering an impartial and unbiased alternative, empowering internal program staff to take control of evaluations.

2. Reorientation of Power

Digital tools are redistributing power within the evaluation process. By providing program staff with access to real-time data via automated dashboards, they can independently interpret and act on findings. This visibility has led to greater awareness of ineffective or unnecessary metrics, prompting some staff to revise their measurement frameworks or challenge funder-imposed metrics that lack relevance. This empowerment not only improves the utility of evaluations but also aligns measurement practices more closely with program needs.

3. Persistence of Pre-Established Metrics

Despite these advancements, pre-existing metrics remain deeply entrenched. All technology respondents indicated that a theory of change model is considered a mandatory starting point for designing digital platforms. Additionally, some participants revealed a tendency to default to funder-imposed metrics, such as the Kessler-10 for mental health, and apply them across their programs. While this approach offers efficiency, it risks disconnecting the measures from their original intent, leading to evaluations that may not accurately assess program outcomes. Moreover, it can distort program implementation as staff adjust practices to meet poorly aligned metrics, potentially undermining program goals.

Evaluation as Advocacy: Legitimating Community and Sector Perspectives on the Function of the Charitable Ecosystem Through Research

Evaluation is often framed around two primary purposes: accountability and improvement. Accountability focuses on demonstrating to funders, staff, communities, and beneficiaries that promised outcomes are being achieved. Improvement uses evaluation findings to identify areas for enhancement, ultimately increasing program quality and effectiveness.

Traditionally, evaluation has been viewed through a two-way governance lens, such as the relationships between funders and programs, or programs and beneficiaries. However, this perspective, derived from private sector models of supply and demand, oversimplifies the complex ecosystems in which charities operate (5). Charities, as creators of social value, must navigate a web of interconnected relationships involving funders, beneficiaries, communities, and other organizations.

This study analysed the systematic review of evaluation reports, and interviews with evaluators to explore why evaluations are conducted, the insights they generate, and the recommendations they propose. While accountability and improvement were evident purposes, a third benefit emerged: advocacy.

Charities are leveraging evaluation reports not only to prove their worth and effectiveness but also to address systemic issues affecting their beneficiaries. Advocacy statements in reports often highlight the limits of individual programs in the face of broader crises, calling on governments or policymakers to implement changes. For example, we observed many statements like:

> *"Our program has achieved strong results for our clients, especially in the face of the current [insert crisis]. However, no single program can substantially transform participants' lives in this context. We call on the government to address [policies/regulations/funding conditions]."*

Interestingly, the government or body being critiqued is often the primary funder of these programs, illustrating the intricate ecosystem charities operate within. Their accountability extends beyond funders to clients, communities, and peers, creating a delicate balance in how public evaluation findings are presented.

Evaluators should begin to recognise **advocacy as a third purpose** of evaluation. This adds complexity to the longstanding trade-off between accountability and learning. Evaluators and stakeholders should question whether a single evaluation can effectively meet all three objectives—accountability, improvement, and advocacy—or if attempting to do so risks fulfilling none.

Beyond informing funders and staff, charities use evaluation reports to share knowledge across their ecosystems. Reports are often published with the intent that other organizations can learn from their findings. This altruistic and integrative focus reflects the broader mission of charities and highlights the need to integrate these considerations into management theories.

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