InterAction Standards – Section 3.0 Organizational Integrity and Transparency
Outcomes Measurement
Adopted December 2018

Introduction

InterAction's *Standards* and the biennial Self-Certification Process are the cornerstones of transparency and accountability in our community. In 2017, InterAction's Board asked that we take a closer look at what type of measurement standards could be incorporated given our broad membership base.

Mary Kay Gugerty, Nancy Bell Evans Professor of Nonprofit Management at University of Washington and George Mitchell, Associate Professor at Baruch College, along with students from the Transnational NGO Initiative (InterAction Associate Member) at Syracuse University's Maxwell School of Citizenship and Public Affairs, undertook the research necessary to produce the following standards.

The final recommendations incorporate information from an environmental scan of peer associations, information intermediaries and global development agencies, feedback from InterAction CEOs, and extensive stakeholder consultations with InterAction members and peers.

The standards are intended to be feasible for InterAction's diverse membership, but to also include 'stretch' provisions that will move the association's members forward. The standards are intended to be used as a whole, as many of the constitutive principles are interrelated. Definitions and implementation details are provided in the technical notes to avoid excessive complexity in the standards themselves.

InterAction Standards – Section 3.0 Organizational Integrity and Transparency

3.8   Organization shall have evaluation and effectiveness policies in place.

3.8.1   *Monitoring and evaluation*. Objectives shall be specific, measurable, realistic, and related to the organizational mission. To support ongoing improvement, outcomes shall be monitored and periodically compared to the objectives. [1] Evaluations shall employ the best feasible methods and should consider any unintended or indirect outcomes in addition to the intended outcomes.

> Technical Note [1]: Objectives and outcomes may be short-term, medium-term, or long-term, and are defined broadly to include the delivery of goods or services to program participants (outputs), the effects of programs on program participants (impacts), the production of events or information, and organizational responsiveness and performance, among other examples. Members may adapt these terms as necessary. For example, objectives may include goals, targets, or intended outcomes, and outcomes may include outputs, results, deliverables, and short-term, medium-term, and long-term outcomes and impacts.

3.8.2   *Accountability and learning*. A member shall maintain a written evaluation policy and executive leadership should prioritize evaluation and encourage the use of information for learning and improvement. [2] A member's chief officer shall submit a report to the organization's board describing the organization's effectiveness, no less than annually.

> Technical Note [2]: This policy should (a) affirm an ethical obligation to determine how programs impact the intended program participants, including through unintended consequences, (b) allocate responsibilities for monitoring, evaluation, learning, accountability, transparency, and responsiveness to specific identifiable individual[s] or unit[s] in the organization, (c) detail the specific organizational purposes to which program evaluations will be put, (d) describe any resources available to support and facilitate program evaluation, (e) establish guidelines for program design (Programs should be informed by relevant prior evidence, articulate a rationale for the intervention and explain the means by which program activities will produce the intended outcomes, and detail how monitoring and evaluation will be undertaken.), (f) provide guidelines for funding evaluation costs, and (g) specify an appropriate evidentiary standard for warranting claims.

> Technical Note [3]: Such a report should address (a) the organization's objectives, (b) its outcomes relative to those objectives, (c) an accounting of corresponding expenditures, and (d) a discussion of material circumstances related to the organization's effectiveness. Effectiveness may be monitored, evaluated, and reported at any relevant level(s) of aggregation, including the project, program, or organizational levels.

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3.8.3   *Transparency and responsiveness*. Monitoring and evaluation activities shall provide appropriate opportunities for community participation, partner and program participant feedback, and stakeholder involvement, as applicable. A member shall publicly disclose information about its objectives and outcomes, as appropriate and in a timely manner. [4]

> Technical Note [4]: Supporting evidence should also be made available. To facilitate learning, members should avoid suppressing evidence of negative results. Members are encouraged to publish their board report on organizational effectiveness online and to upload information about objectives and outcomes to online platforms that enhance data transparency.

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