**Session Description:** The Duke Global Health Institute Evidence Lab is developing an evaluation toolkit designed to help social enterprises in health use creative methods to derive value from their impact measurement. We will briefly highlight the toolkit, which includes four diverse modules, including instructions for assessing changes in patients’ access to care, an economic analysis decision tree, and a tracking tool to help measure sector influence. We will then discuss avenues of use for the toolkit, and how use of the toolkit may expand beyond social enterprises in health to donors, investors, and social enterprises in other sectors.

**Session Leader:** Jennifer Headley, Duke Global Health Institute Evidence Lab

**Evidence Lab**

Part of the Social Entrepreneurship Accelerator at Duke (SEAD)

- Work with Mid stage nonprofits and for profit global health solutions addressing quality and affordable healthcare in Latin America and Africa

**Evaluation Toolkit**

- Economic Analyses
- Patient Level
- Expansion Guidelines
- Organizational Reach

**Evaluation in Proposals**

- Be specific about theory of change

**Evaluation can**

- Address limits to growth by credibly demonstrating outcomes of work
- Inform critical business decisions and strategy
- Communication of impact range

**What limits growth?**

- Funding and Investment
• Performance mgmt. – how can you be cost effective while getting quality data

Entrepreneur Evaluation Challenges

• Few have access to the gold standard
• Lean data, needs specific expertise

Addressing Challenges

• Development and testing of Entrepreneur Evaluation Toolkit
• Alternative methods
  o M&E

Evaluation Toolkit

• Economic Analyses
  o Entrepreneurs have lots of questions, but don’t know the most important ones and the corresponding analysis needed.
  o Created an Interactive decision tree
    ▪ Overview of different types of financial and economic analyses
    ▪ For each analysis, additional info on cost-consequence analysis
• Patient Level
  o Purpose: Provides patient questions in multiple modules, exploring ways for
  o Highlights the questions to incorporate into existing forms and corresponding impact statements
  o Example Modules: access, adherence, quality of care
  o Secondary Product: Out of pocket healthcare costs brief
• Expansion Guidelines
  o Guidance on leveraging expansion to a new clinic/site/market as an opportunity to measure impact
  o Provides suggestions on the methodology
  o
• Organizational Reach and Influence
  o Examines and codifies sources of influence to set priorities for targeted outreach
  o Entrepreneurs often want to influence the field of healthcare

Key Takeaways

• Unique Factors
  o Entrepreneurs usually have multiple theories of change in their head
  o So, the tool tries to lay it out for them
  o Evaluation determined by funding stream and stage of growth
- Technical Assistance
- Need for business sustainability
- No controlled environment, quick timeframe required

• Multi-Faceted Logic Model
  - Includes both clinic facing and donor facing (and a combination of both)
    - Then broken down by goals, product activities, desired outcomes and impact