## External QA

External QA refers to the process of seeking quality input from outside of our immediate team – in other words, involving external experts, stakeholders, or collaborators to review or provide feedback on our work. Engaging in a planned external consultation process allows us to leverage outside expertise to improve our research throughout the project lifecycle. The benefits of external QA are significant. It can:

* increase buy-in for our results in the wider policy and research communities,
* help us identify additional gaps in knowledge or perspectives we might have missed internally,
* reduce the risk of us working on something that has already been done elsewhere, by tapping into the broader community’s knowledge.

Time for such engagement needs to be allowed throughout a project’s lifecycle. Such engagement aligns with e61’s core principle of collaboration: **e61’s User Engagement Plan** emphasises that where feasible, users (external stakeholders) should be active participants in our work, even co-producing or commissioning work in some cases. Involving external people in QA is one way to put that principle into practice. By getting an external seal of approval (formally or informally) on our research, we bolster the trust others can place in it.

## External QA motivation and explanation

Just like our internal processes, we can think of external QA in three stages:

* **The creation process** – engaging external input during the formulation and development of a project (for example, consulting external experts on the research question or approach).
* **The clearance process** – seeking external review or feedback on draft outputs as part of the final validation before release.
* **The presentation process** – using external presentations or briefings as a way to gather feedback and further refine our work, as well as to ensure our results resonate with outside audiences.

We describe each of these stages below, including best practices to integrate external QA in a way that supports rigor, collaboration, and institutional learning without excessive burden.

**Creation Process**

In the context of external QA, the creation process means involving external parties *early* in the life of a project. This is about proactively seeking outside perspectives while you’re scoping and designing the research, rather than waiting until everything is done. There are several ways to do this with minimal overhead that yield high value:

* **Stakeholder consultation at project inception:** Before diving into a new project, identify a few key external stakeholders or experts and run your initial ideas by them.
* **Advisory groups or external mentors:** For larger projects, consider having an informal advisory committee or at least an external mentor.
* **Front-loading user engagement:** As we plan a project, we should embed external engagement into the project plan itself. The e61 User Engagement Plan provides guidance on how to do this.
* **Co-production opportunities:** In some cases, external QA in creation can go even further into **collaboration**. If there’s a clear benefit, we might partner with another organisation or researcher on a project.

For all these efforts in the creation stage, the key is to **maintain focus and manage scope**. You don’t want external input to derail the project or force you to chase too many directions. And always be mindful of confidentiality and intellectual ownership issues – if you’re sharing early ideas, make sure it’s with people you trust or under agreed terms if the work is sensitive.

In summary, involving externals during the creation process is about **harnessing outside knowledge to shape our projects correctly from the start**. That feeds into better dissemination and impact down the line.

**Clearance Process**

External QA during the clearance process means getting an outside perspective on our near-final work, as a last check before we finalise and publish. This is analogous to a peer review in academic publishing or a vetting process in think-tank work. The idea is to catch things that our internal team might have overlooked and to get an impartial read on whether the work stands up to scrutiny.

Here are some approaches and best practices for external QA at clearance:

* **External peer review of draft outputs:** Identify one or two external experts and ask them to review your draft report or paper. These could be academics who research the topic, analysts from a government department, or other professionals in the field. Provide them with the draft and specific questions if applicable (e.g., “We’d especially love your thoughts on Section 3, where we interpret the results for policy implications.”). Because this isn’t a formal journal peer review, you can keep it flexible – even an email with comments or a phone call discussing their impressions can be extremely useful. External reviewers might spot analytical weaknesses, logical leaps, or even simple clarity issues that we’re too close to see. They can also validate what we got right, which gives confidence. **Leverage your networks**: e61 has many connections; don’t hesitate to use them for a quick review favour. Often, external folks are flattered to be asked and happy to contribute a bit of advice.
* **Circulate for broader feedback (when appropriate):** In some cases, especially for big reports or important policy notes, we might circulate a late-stage draft to a small circle of stakeholders for feedback.
* **External replication or audit (for technical pieces):** If a project is highly technical or data-heavy, one gold-standard QA is to have an external party attempt to replicate your core result. This could mean sharing the code or methodology with an external researcher (perhaps under confidentiality) and seeing if they can arrive at the same result independently.
* **Expert panels or workshops:** Another approach is to hold a short workshop or roundtable with a few experts where you present the findings (maybe in draft form) and invite open critique. This is like an external version of our internal presentations.

When doing external clearance QA, it’s important to **manage the feedback carefully**. External reviewers might have differing opinions or could suggest changes that conflict with each other or with our internal stance. It remains the team’s job to critically evaluate external input. Not all suggestions will be adopted, and that’s okay. We should graciously thank external contributors and explain (when appropriate) our decisions if we diverge from their advice. Usually, though, even if we don’t take a suggestion outright, the feedback helps us strengthen our explanation or consider a caveat to mention.

One more consideration: **timeline management**. External QA at clearance will almost certainly require building in extra time. People outside the team won’t drop everything to read our draft overnight (usually). We need to give them adequate time – generally at least a week or two for a review, depending on length – and then time for us to process their feedback.

External QA in the clearance phase is about opening ourselves up to critique from those not involved in the work’s day-to-day creation, and using that critique to polish the final product. When done right, it significantly boosts the rigour of our output.

**Presentation Process**

The presentation process for external QA is slightly different from the internal one; and also differs from the process for external engagement and influence discussed in the **e61 Communication Plan**.

Within the QA process, external presentations are an important mechanism for challenging and improving e61 work. Presentations to university or expert audiences are not just about influencing these groups, but also putting our work under pressure and discovering where future work should be focused.

Quality Assurance through external presentations is an important part of the **unique academic rigour** that should be applied to large e61 projects.

**Continuous feedback** and engagement with experts allows us to understand where our work should be placed, and identify what important questions are missing for future projects. Facing public external feedback also helps to build the **credibility of the work and the Institute**.