



*Serving the public and non-profit sectors through independent program evaluation, applied research, and technical assistance.*

## EVALUATION BRIEF

### How to Select an Evaluator

June 2008

#### Introduction

#### Assessing Your Needs

##### Ask Yourself the Right Questions

Often organizations who receive federal grants find themselves in the position of needing an evaluation of their project but not knowing how to go about finding the “right” evaluator to meet their needs. Before beginning a search or deciding your organization can handle an evaluation internally it is helpful to ask two important questions: (1) What do we want or need to get out of an evaluation? (2) What kind of evaluator do we need in order to get the information we want?

##### What do we want or need to get out of an evaluation?

Too often the quick answer to this question is that “We need to do an evaluation because the federal agency said we have to.” While this may be true, it is important to not only think about the type of evaluation activities that are required but also to realize that an evaluation process is an opportunity to make a positive difference in a project and organization. Below is a list of some reasons why organizations often conduct an evaluation. Which of the following are true for your organization?

1. We have to do an evaluation because it is mandated.
2. We want to know if this program and our staff are doing what we said we would do.
3. We want to know more about the people we are serving.
4. We want to know how we can make our program better.
5. We want to know how and why this program works or does not.
6. We want to propose a good evaluation plan so that our grant will get funded.
7. We want to know that we are helping people.
8. We want to be able to prove to others that our program is effective.

The farther down the list of statements you find yourself agreeing with, the more rigorous an evaluation needs to be. If you agreed with statements 2 and 3, these are typical goals of a “**Process Evaluation**,” where the typical goal is to document that you are implementing a program as intended with grant funds. If you agreed with statements 4 and 5, these are typical goals of a “**Formative Evaluation**,” where the goal is to obtain information that aids in the development or refinement of a program. If you agreed with statements 6, 7, or 8

these are typically associated with an “**Outcome Evaluation**,” where the goal is to document that the program makes a real difference in peoples lives. Knowing what kind of evaluation your organization needs is an important first step in finding the best evaluator to meet your needs.

#### What kind of evaluator do we need in order to get the information we want?

Frequently, agency and program staff are tempted to save money by doing an evaluation themselves. Indeed, it is common for program staff to feel that evaluations take valuable resources away from service delivery. However, experienced program staff member most often agree that a good evaluation provides much more to a program than it takes away.

Regardless, the important question you need to answer is “*do we (your agency) have the capacity to do the kind of evaluation that we need, and if not what kind and how much outside support will we need?*” Generally speaking the farther you made it down the list above, the more sophisticated and complicated the evaluation becomes and the greater the need for some kind of external evaluation support. This is particularly true if your goal is to prove to others the effectiveness of the work your organization does, because outside audiences may question unintentional biases that may exist when agencies evaluate their own work. If you are confident that you have the in-house resources, experience, and skills necessary to conduct the kind of evaluation you need, then you may not need an external evaluator. If you are not sure you have the capacity, or are certain that your organization does not have the capacity (skills, experience, and time) then some level of external evaluation support is probably a good idea.

## Finding and Selecting and Evaluator

### Identifying Evaluation Activities

There are many different ways and levels at which an evaluation consultant can be involved, ranging from providing basic advice to conducting the entire evaluation and every combination in between. It is important to think in advance of the types of assistance that your organization might want from an evaluator. Below is a listing of some of the activities that an evaluator might assist you with. As there are rarely enough financial resources to have everything done, think in advance about which activities might be more or less important for you and what activities, if any, your organization can perform or assist with.

- Evaluation Planning and Design
- Needs Assessment
- Logic Model Development
- Instrument / Question Development and Selection
- Data Management System Development
- New Data Collection
- Data Management
- Data Analysis
- Report Writing
- Presentations
- Grant Writing

### Finding Evaluators to Consider

Once you know what your organization wants and needs out of an evaluation and have some idea of what you want an evaluator to do, how do you go about finding someone?

- **Start Locally** - Start by looking for evaluators in your local area. Colleges and Universities are usually a good place to start. Useful contacts and referrals can often be found in Research Administration Departments and Community Partnership Offices. University based researchers with experience in social service programs can often be found in Department of Social Work, Psychology, Anthropology, Sociology, and Business. Land-grant State Universities also have Extension Services which may be able to provide support at no cost. In addition to Colleges and Universities, check out local non-profit and business consulting firms. Even if these contacts can not assist you with the evaluation, they can direct you to others who can.
- **Talk to your colleagues** - Talk to other programs and agencies that have similar programs and ask about their evaluation connections and satisfaction with evaluation services.
- **Check the Publications** - See who the researchers are that publish evaluation or other types of research in your area of concern.
- **Check National Associations** - Membership organizations such as the American Evaluation Association provide linkages to members who are available to provide evaluation services.
- **Ask for Assistance** - The organizations and government agencies that sponsor your services and evaluation are very interested in your receiving a quality evaluation and are often available to assist you in finding an evaluator. For OFA Marriage and Fatherhood grantees, James Bell Associates has been contracted to provide evaluation technical assistance and is available to aid in your search for an appropriate evaluator.
- **Advertise** - Place an advertisement for your evaluation job in the paper, on the web, and on evaluation web sites.

### Questions to Ask/ Things to Asses

In most cases, is it best to have more than one evaluator to consider. Having two or three evaluation candidates will help demonstrate the relative strengths and weaknesses of each. An interview with an evaluator should be a conversation where the evaluator suggests ideas about how an evaluation might be conceptualized and designed in a collaborative manner with you. Below are some of the things to think about when considering an evaluator.

- What is the evaluator's skill set? Does he/she have the educational background and experience to do the tasks required? Has he/she done this type of work before? In particular, find out about his/her quantitative and qualitative skills and how these match up with the needs for your evaluation.
- What is the evaluator's experience with your program's topical area? While evaluation skills are somewhat generalizable to new topical areas, it is best (when possible) to also have someone who has experience with your program's topical area. For example, has he/she worked with Fatherhood programs, or Marriage Education Programs before?
- What is the evaluator's accessibility? How easy will it be to work with this person on a daily basis? How often will he/she interact with you? Is he/she located nearby or is

the evaluator located in another area or state? Is the level of accessibility appropriate for the evaluation plan?

- What is the evaluator's affordability? Can your organization afford the proposed cost? Is the evaluator willing to work with your organization to keep costs down or to find additional resources?
- What is the evaluator's capacity? Is this an individual consultant, a company, or a team? Does he/she have the resources to do the proposed research tasks including data collection? Who will actually be doing the work (e.g. if a university professor is hired, will students be the ones actually doing the evaluation?) Is there any backup support in case the evaluator becomes ill or quits? What is the evaluator's ability to draw upon outside resources and partner organizations to tap skills and capacity he/she may not have?
- What is the evaluator's published or unpublished track record? Has this evaluator published research or evaluation finding in peer-review journals? Have they produced high quality reports for evaluations that we not published? Will he/she provide you with examples?
- Does the evaluator have references? Can you obtain the contact information for other organizations that he/she has done work for? Is he/she a member of recognized professional evaluation organizations?
- Do I like the evaluator's attitude? Remember that working with an external evaluator means that your organization is entering into a relationship. It is important to find someone who works well with people in your organization, who works as a partner, who is flexible in meeting your needs, and is open to adapting planned activities as the evaluation progresses. Do you trust this person and their judgment? These are some factors that will significantly influence whether you feel the evaluation has been a success or not.

### Request a Proposal

Once your organization has selected a small group of potential evaluators, it is important to ask for a proposal specifying the scope of work, timelines, deliverables, and costs. It is a good idea to ask the candidates to price their proposal separately for each major activity. That way you see how each part of the evaluation fits together and if the evaluation plan needs to be redesigned to be more affordable. Make sure that you get copies of the principal evaluation staff resumes and review them to make sure they have the experience they described. Also make sure that in the proposal, details are provided regarding how and when progress and finding from the analyses will be reported. If feedback is important for a formative evaluation, make certain that you will get feedback in time to make a difference to your program. If you will be documenting program impacts, be sure the evaluator is willing to talk about the results in presentations to both internal and external audiences. Think about how you will want the information disseminated in reports, publications, or other venues.



Renegotiate

Remember that a proposal is just that - a proposed set of activities. If your organization likes the evaluator but not all aspects of the plan or the costs, work with the evaluator to come up with a proposal that meets everyone's needs.

A good evaluation will benefit an organization in ways that will not be expected or predicted, and you may find yourself asking how you ever operated programs in the past without an evaluation. The key to a successful evaluation is having the right plan and having the right person(s) to implement an evaluation.

For more specific guidance on finding an evaluator, contact your Federal Program Officer or James Bell Associates for assistance.



### About James Bell Associates

James Bell Associates (JBA) is a leading and respected evaluation and research services firm based in the Washington D.C. area. Over the last three decades, JBA has established a national reputation for excellence in evaluation and research focusing on innovative health and human services programs run by Federal, state and local governments, as well as universities, foundations and private firms. JBA is widely known for its highly customized approaches to planning and conducting independent program evaluation and applied research and for offering practical technical assistance (TA) and training to enhance clients' performance measurement capability.

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