

Selecting an Evaluation Consultant

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Many funded partners consider hiring evaluation consultants to carry out evaluation activities. This brief explores possible advantages and disadvantages of using an evaluation consultant; steps to follow to hire an evaluation consultant; how to identify a qualified evaluation consultant; the process and criteria to use in the hiring process; accountability procedures to use to ensure high-quality work produced on schedule; and resources to identify an evaluation consultant.

Advantages and Disadvantages of Using an Evaluation Consultant Instead of an Internal Evaluator

Advantages may include

- Providing a more objective, unbiased approach and perspective on the program, which may increase the credibility of the evaluation and its findings.
- Providing technical expertise not available within your agency.
- Providing the ability to do the work more quickly and at less cost.

Disadvantages may include

- Involving program staff less in the evaluation because they believe it is someone else's responsibility.
- Increasing the cost of the evaluation because of consultant costs.
- Increasing the time needed to explain the program and evaluation requirements.
- Increasing the possibility of misunderstanding by the consultant regarding the evaluation objectives and type of evaluation products needed.
- Failing to provide the work because of lack of oversight.

Steps to Follow When Hiring an Evaluation Consultant

- Discuss with other agency staff and agree on the specific needs a consultant could address;
- Follow your agency's policies and procedures (e.g., write a Request for Proposals; develop a contractual or consultant agreement, etc.) to specify:
 1. Scope of work and schedule of deliverables.
 2. Consultant responsibilities.
 3. Proposed payment schedule.
 4. Proposal materials required (e.g., CV, work samples, references).
 5. Proposal rating criteria.
- Establish accountability procedures to manage the evaluation consultant (see below).

How to Identify a Qualified Evaluation Consultant

- Recommendations from colleagues.
- Recommendations from evaluation experts.
- Referrals from professional associations (e.g., American School Health Association; American Evaluation Association or its local affiliates).
- Ads placed in professional publications or newsletters.
- Postings on professional websites, listservs, electronic forums, and job bulletin boards.
- Establish a selection committee to review proposals, CVs, and other relevant materials.

How to Identify a Qualified Evaluation Consultant (cont.)

- Develop criteria on which to assess and select the most qualified consultant.
- Assess each candidate using the same scoring system.

Each criterion should be assigned a numerical value reflecting its relative importance in comparison with other criteria. For example, “training in evaluation methods” might be assigned 10 points out of a possible total of 100 and “experience in evaluating school health programs” might be assigned 30 points. Criteria could include

- Experience in evaluating school health or similar programs.
- Training in evaluation methods.
- Knowledge about your program context.
- Articulation of how evaluation addresses the mission, approach, and needs of your program.
- Diagnostic and analytic skills.
- Ability to perform work within given timelines and other commitments.
- Interpersonal skills.
- Match between consultant’s operating style and approach and your program staff.
- Quality and utility of work products.
- Ability to build the evaluation capacity of your agency staff.
- References, including clients and other evaluators.
- Proposed costs.

Procedures for Accountability

Procedures to ensure that the evaluation consultant provides high-quality work within an appropriate timeframe include

- Establishing a contract that specifies the tasks to be performed. Include precise objectives and observable milestones related to performance, products, and expected level of effort tied to deliverables.

- Requiring interim progress reports tied to performance milestones that describe activities accomplished, activities planned, and any problems encountered, as well as corrective actions taken.
- Appointing one staff member who understands the scope of the consultant’s work as liaison with the consultant to facilitate clear communication and efficiency in the work.
- Establishing a phased payment schedule tied to observable milestones or completion of specific tasks (except for short consultation engagements).
- Establishing regular e-mail, phone, and/or face-to-face meeting updates.

Resources

Administration for Children and Families, U.S. Department of Health and Human Services. *The Program Manager’s Guide to Evaluation*. Available at: http://www.acf.hhs.gov/programs/opre/other-resrch/pm-guide_eval. Accessed October 10, 2005.

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American School Health Association. Website: <http://www.ashaweb.org/>. Accessed November 22, 2005.

W.K. Kellogg Foundation. Evaluation Toolkit. Available at: www.wkkf.org/Programming/Extra.aspx?CID=281&ID=2. Accessed November 3, 2005.

Shenson HL. *How to Select and Manage Consultants*. San Diego, CA: Lexington Books & University Associates, Inc.; 1990.

For further information or assistance, contact the Evaluation Research Team at ert@cdc.gov. You can also contact us via our website: <http://www.cdc.gov/healthyyouth/evaluation/index.htm>.