Selecting an Evaluation Consultant

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


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