

PICKING THE RIGHT EVALUATION TEAM is crucial to an evaluation's success and usability. Unless you want an evaluation that will just be thrown in a file drawer (or worse), the most important step is choosing the right evaluation company for your needs.



v.1.0

# how-to choose an evaluator

how-to?

**#1**  
Plan

**#2**  
Search

**#3**  
Decide

# #1



## Plan

The first crucial step is to plan the evaluation. Wait a minute, that's the evaluator's job, right? Wrong. The more that you are certain about what the evaluation should look like, and the goals and objectives that should be reached, the easier the search and decision process will go.

### Key Planning Steps:

1. Summarize the goal of the evaluation in one sentence. "By the end of the evaluation, we should know..."
2. Decide who will see the results. Funders? Staff? Students?
3. Come up with 1-2 questions that each group of stakeholders would like answered.
4. List data is already available that might answer these questions.
5. Decide on a budget, start date, and timeline for the evaluation.

# #2



## Search

Now that the evaluation is outlined, it's time to find an evaluator. Your next step is to perform a search of the evaluators in your area.



### What to look for:

- Expertise in the area of interest
- Samples of work
- Good writing / presentation on webpage
- Existing clients

### Key resource:

The American Evaluation Association ([www.eval.org](http://www.eval.org)) has a "find an evaluator" page. Many firms and individuals are listed by area of expertise.

### Keep budget in mind:

- Large evaluation firms typically only perform evaluations with large budgets (\$100,000+ per yr)
- Very few firms will perform evaluations for budgets of \$10,000 or less per year. For these projects, look for individuals.

- **Make sure to find at least 2-3 evaluators or firms.**

# #3



## Decide

You've found some good contenders. Now, it's time to make a decision.

The best candidate will:

- Have concrete ideas about how to proceed with the evaluation.
- Have expertise in the area
- Be well-spoken and easy to talk to
- Be responsive
- Have an experienced team
- Be able to write a well-written evaluation plan. You should ask for this before your decision is made. A great evaluation plan will include strong evaluation questions, a logic model, a description of all evaluation activities, and a detailed timeline.

## Next Steps

Once you've found the perfect candidate, there are just a few more steps to make sure everything goes smoothly.

- Edit the evaluation plan with the evaluator.
- Write a formal evaluation contract.
- Have the evaluator sign a Data Sharing Agreement if you plan to provide sensitive data.



## Sample email

Below is a sample script that you can modify and send to potential evaluation firms.

Dear [Evaluator]:

My name is [Your name] and I work with [company], a [type of services offered.] We are currently exploring conducting an evaluation to [insert goal of evaluation here!] during [insert start date and timeline]. We hope to find the answers to several important questions, including [insert questions here]. We have some data already available, including [insert data here] although we will also require primary data collection to answer our questions.

I came across your company on the American Evaluation Association, and was hoping that you could tell me more about your company and see if you have any ideas about how we might go about the evaluation. Our budget is approximately [ ].

I would also be interested in some samples of some of your recent work. You may contact me at: [insert contact info here].



# Questions?

This guide was intended to get you started on the path to finding a great evaluator.

Here are a few of the many fantastic websites that can answer your evaluation questions.

- <http://www.grantsnorthwest.com/using-an-outside-evaluator/>
- <http://minorityhealth.hhs.gov/Assets/pdf/Checked/1/HowtoHireanEvaluator.pdf>
- <http://coalition4evidence.org/wp-content/uploads/2012/12/PublicationGuideFindingEvaluator07.pdf>

