

# Selecting and Managing an Evaluation Consultant or Team

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The purpose of this guideline is to provide ideas and suggestions for selecting and managing an evaluation consultant or evaluation team. It is designed to shed light on when an external evaluator/team should be employed and, what factors should be considered when selecting them. It provides a 'further readings' and 'web resources' section.

All of the evaluation guidelines and highlights referenced are available on the Evaluation Unit's website at: [http://web.idrc.ca/en/ev-32492-201-1-DO\\_TOPIC.html](http://web.idrc.ca/en/ev-32492-201-1-DO_TOPIC.html)

## Selecting an external evaluator or evaluation team

In certain situations, hiring an external evaluation consultant or evaluation team may be appropriate and/or required. Generally speaking, expertise, impartiality, cost, and time are key considerations for employing an external consultant/team for an evaluation. That is, the scope and complexity of the evaluation may demand the expertise of an external consultant; the politically sensitive nature of a program or project may require the impartiality of an external evaluator; or, where personnel resources and timeframe are more scarce than funding, an external evaluator may be the better choice. The following table presents the main advantages and disadvantages associated with employing an internal team member versus an external consultant:

	<b>Internal</b>	<b>External</b>
<b>Advantages</b>	<b>Timely</b> – Immediately the program/project has information that begins informing program/policy decisions.	<b>Perspective</b> – An external evaluation may provide a view of the program that is considered more objective by the intended users.
	<b>Buy-in</b> – Those involved have the opportunity to have their voices heard, and may want to contribute to the evaluation.	<b>Credible</b> – An external evaluation may be perceived as having more credibility for people outside of the program/project (funding partners, stakeholders, etc.)
	<b>'Insider' perspective</b> – An 'in-house' evaluator may be more familiar with the staff, community, issues, and resources associated with the project/program.	<b>Expertise</b> – An external evaluator or team may possess certain evaluation research skills and knowledge that the internal evaluator may not. S/he may also have exposure to a wider range of issues, methods, and practices that would be useful to incorporate.

	<b>Internal</b>	<b>External</b>
<b>Disadvantages</b>	<b>Time consuming</b> – Internal evaluations involve staff time that may draw on limited personnel resources.	<b>Cost</b> – External evaluations can be more costly than internal evaluations.
	<b>Bias</b> – There may be a perception of bias if the internal evaluator is ‘too close’ to the subject matter; this may result in the risking the credibility of the evaluation and hindering its use.	<b>Time</b> – It may be difficult to manage an evaluation conducted by an external evaluator.
		<b>Expertise</b> – It may be difficult to find evaluators who understand the region or programming area.

One good option can be to include internal and external people on the evaluation team. This would combine the benefits of each type of evaluation – that is, external expertise and impartiality can be maintained without losing the benefit of the internal person’s first-hand knowledge of the project/program.

### Selecting an external consultant or evaluation team

One of the first things to consider when selecting an external evaluator is the *type* of evaluation and the corresponding *role* of the prospective evaluator; that is, different types of evaluation will require different sets of responsibilities, roles and skills for the evaluator. For instance, conventional impact-assessment is likely to require a different role for the evaluator than a utilization-focused or action-oriented evaluation. Each will call for different methodological expertise as well as different degrees of ‘distance’ between the evaluator and the subject. If you have a particular methodology you want to use be sure that is clear or the evaluator may resist using it.

Regardless of the evaluation topic and intended use, the most important general characteristics to consider when selecting an external evaluator are flexibility, ability to problem solve, and credibility. What follows is a general description of the general qualities you might need depending on the intended use(s) of the evaluation.

<b>Evaluation Use</b>	<b>Evaluator Qualities</b>
<b>Accountability</b> – The intention of the evaluation is to determine the worth or merit of a program/project.	The evaluator/team should possess qualitative and quantitative expertise and experience.
<b>Learning</b> – The emphasis of the evaluation is on facilitating program/project improvements.	The evaluator/team must be reflective, be comfortable with concepts of adult education and organizational learning and be willing/able to play the role of facilitator as well as having quantitative and qualitative methodological expertise.
<b>Innovation</b> – The aim of the evaluation is to facilitate the design of new programs/projects based on what works.	The evaluator/team should be a strong leader, team player, and possess good analytical skills.

## Characteristics of an Evaluator or Evaluation team

❖ **When selecting an external evaluator or evaluation team, the following basic qualifications and criteria should be considered:**

- Evaluation experience and expertise
- Quantitative and/or qualitative research skills
- Professional expertise on the issue (e.g., technical, theoretical, experience)
- Knowledge of the context (e.g., global, country, region, local)
- Development expertise and experience
- Multidisciplinary skills (e.g., economic, demographic, environmental, sociological)
- Ability to effectively communicate to the targeted users and audience
- Gender, cultural balance, sensitivity, and language skills
- Sensitivity to the project's principles (e.g., empowerment, participatory-action, capacity-building, etc.)
- Familiarity with IDRC and partner institutions
- Independence

❖ **Beyond meeting essential requirement (above), several questions may help in the final selection of an evaluation consultant:**

- Does the consultant's philosophical position – vis-à-vis evaluation and the research you support – 'match' the specific program/project to be evaluated?
- Is the consultant open to 'utilization-focused' evaluation approaches – i.e., willing to assist in building the skills, knowledge, and abilities of other staff and stakeholders as well as take responsibility for facilitating use?
- Is the consultant able/willing to share her/his role in the evaluation, and balance the responsibilities?
- Is the consultant willing/able to be creative with the evaluation and able to evaluate innovation?

### TIPS

**Do your homework.** Before hiring an evaluator, look at their past work, check references, and make sure you feel comfortable he/she/they are credible, competent and capable of leading a useful evaluation process.

**Make contact early.** Good evaluation consultants are usually busy. So give them enough lead-time to fit in their schedules.

IDRC staff and management can call on the Evaluation Unit for support in identifying evaluators at any stage. The Evaluation Unit provides technical input, facilitates planning and implementation processes, and provides print and electronic resources to support the ongoing evaluation work of Centre programs.

## Source & Further Reading

Harding, W. 2000. *Locating, hiring, and managing an evaluator*. Newton, Mass.: Northeast CAPT.

Patton, Michael Quinn. 1997. *Utilization-Focused Evaluation*. Sage Publications, California.

Swiss Agency for Development and Cooperation. 2002. *Guideline: Evaluation and Controlling*. [www.sdc.admin.ch](http://www.sdc.admin.ch).

W.K. Kellogg Foundation. 1998. *W.K Kellogg Foundation Evaluation Handbook*. Michigan.

Worthen, B., and J. R. Sanders. 1987. *Educational Evaluation: Alternative Approaches and Practical Guidelines*. New York: Longman.

## Web Resources

Education & Human Resources – Research, Evaluation, and Communication.  
A User Friendly Handbook for Project Evaluation. Virginia.  
<http://www.ehr.nsf.gov/rec/programs/evaluation/handbook/chap6.pdf>

Juvenile Justice Evaluation Center. Hiring and working with an evaluator. Washington, D.C.:  
<http://www.jrsa.org/jjec/about/publications/evaluator.pdf>

Rabinowitz, P. Choosing evaluators. Community Tool Box.  
[http://ctb.lsi.ukans.edu/tools/EN/sub\\_section\\_main\\_1351.html](http://ctb.lsi.ukans.edu/tools/EN/sub_section_main_1351.html)