Finding the Right People for Your Program Evaluation Team:
Evaluator and Planning Team Job Descriptions

Overview

Broad stakeholder engagement is an essential element of the National Asthma Control Program's approach to evaluation. People who have been included in evaluation planning and implementation are more likely to help ensure that the findings, which represent an investment of their time, are put to use. And so it follows that the evaluator is but one member of a team of people necessary to make the most of your evaluation.

This packet is designed to help you think about how to build your evaluation team. It includes:
- a sample job description for an evaluator
- a list of evaluator competencies
- a sample letter to recruit members of your strategic evaluation planning team
- a sample letter to recruit members of your individual planning team.

Due to the wide array of state-specific contracting requirements, we have not included a sample or template for use in evaluation contracting, though you may find the sample job description helpful in that task as well.

In addition to designated evaluation staff, whether internal or contracted, each staff member should be prepared to contribute to evaluation activities. We recommend including in job descriptions language that highlights the role of non-evaluators in evaluation. For example:
- *"Staff will be expected to contribute to program evaluation and monitoring activities."* OR
- *"Staff will be expected to contribute to program evaluation and monitoring activities, which may include tasks such as participating in planning meetings, limited data collection, interpreting evaluation data, action planning based on evaluation findings, and providing insights about program performance and evaluation tasks to the designated evaluator or evaluation lead."*

All of these samples are intended to be a starting point for you in creating your own resources. They will likely need to be tailored to your program and may even need to be tailored to a particular evaluation.

Many resources are available to help you convene an effective evaluation team and build or enhance its capacity to contribute meaningfully to your program. The National Asthma Control Program's website is an excellent place to start: http://www.cdc.gov/asthma/program_eval/

Sample Evaluator Job Description

We are providing this sample job description to assist you in hiring your asthma program evaluator. Our job description is organized around the six steps of the CDC Evaluation Framework and outlines some of the knowledge, skills, and abilities an evaluator needs to complete each step. Note this sample description does not address formal educational requirements. Evaluation practitioners come from many academic disciplines, and many evaluators have learned the field by experience rather than formal educational programs.

This list is not all-inclusive, nor are we endorsing this as the only list of attributes to look for in an evaluator. It is unlikely you will be able to hire an evaluator who possesses **all** the skills listed. However, it is important to fill the position with someone with many of these skills as well as a willingness to learn new skills.

See module 1 of *Learning and Growing Through Evaluation* (appendix D) for additional guidance on hiring an evaluator.

Principal Duties:
- Work with stakeholders to develop a comprehensive strategic evaluation plan that identifies and prioritizes evaluation activities to be completed during the five-year CDC funding period.
- Work with stakeholders to develop and implement individual evaluation plans for prioritized program areas.
- Implement evaluations in all three areas of the state asthma control program – partnerships, surveillance, and interventions.
- Ensure that evaluation activities are complementary to state program operations and activities and consistent with the state asthma plan.

Knowledge, Skills and Abilities:

Overarching Items:
- Knowledge of or familiarity with the CDC Framework for Program Evaluation in Public Health.
- Working knowledge of the Joint Committee on Standards for Educational Evaluation's program evaluation standards (e.g., utility, feasibility, propriety, accuracy, and accountability).
- Knowledge of or familiarity with the American Evaluation Association's Guiding Principles for Evaluators.
- Ability to engage with, listen to, and learn from a broad range of evaluation stakeholders, encouraging their meaningful participation.
- Knowledge of the distinctions between evaluation and research.
- Ability to identify limitations of one's evaluation expertise and devise methods for acquiring additional evaluation knowledge when necessary.
- Commitment to ensuring that evaluation activities are done in a culturally competent manner.

Step 1 – Engage Stakeholders:
- Ability to educate program staff and partners about evaluation concepts and methods.
- Ability to engage stakeholders in an evaluation process based on shared priorities, including meeting facilitation, presentation, conflict resolution, and negotiation skills.
- Ability to work as part of an interdisciplinary team to plan and conduct evaluations.

Step 2 – Describe the Program
- Ability to organize and summarize information in a clear and concise manner.

- Ability to understand the context of a program and how it affects program planning, implementation, outcomes, and even the evaluation.
- Ability or experience in the development and use of logic models to describe complex programs.
- Ability to provide leadership in a team setting, move members forward and build consensus.
- Skill in developing and articulating program goals and objectives in a structure supporting evaluation.

Step 3 – Focus the Evaluation Design

- Knowledge of various evaluation designs (e.g., non-experimental, experimental, quasi-experimental).
- Experience with evaluations using mixed method approaches.
- Knowledge of approaches for generating, revising, and prioritizing evaluation questions.
- Knowledge in the development of evaluation plans.
- Knowledge of methods for designing evaluations so as to increase the likelihood that the findings will be used by primary evaluation stakeholders.

Step 4 – Gather Credible Evidence

- Ability to lead the asthma control program's staff in developing and testing data collection instruments.
- Ability to identify and assess existing data sources for their potential use in program evaluation.
- Ability to gather data using qualitative and quantitative approaches such as interviews, group processes, participant observation, surveys, electronic data files, or other methods.
- Ability to manage databases, construct data files, conduct and supervise data entry, and perform data edits/cleaning.
- Knowledge of methods for protecting confidential data.

Step 5 – Justify Conclusions

- Knowledge of appropriate quantitative and qualitative data analysis methods.
- Ability to conduct analyses using appropriate analytic tools for quantitative data (e.g., SAS, SPSS, Minitab) and/or qualitative data (e.g., Nvivo, Atlas.ti, MaxQDA).
- Ability to develop criteria and standards reflective of the values held by key evaluation stakeholders.
- Experience with synthesizing information generated through an evaluation to produce findings that are clearly linked to the data collected.
- Skill in working with stakeholders to develop feasible recommendations.

Step 6 – Ensure Use and Share Lessons Learned

- Ability to prepare and present evaluation results in a manner that increases the likelihood that they will be used and accepted by a diverse group of stakeholders.
- Ability to develop action plans and systems to facilitate and track implementation of evaluation findings and recommendations.
- Ability to work with stakeholders to present analyses, find common themes, and identify relevant and actionable findings from evaluations.
- Skill in developing and implementing a communications and dissemination plan.
- Willingness to work with stakeholders to create and implement an action plan based on evaluation findings.

Competencies to Look for in an Evaluator

To assist you in hiring an evaluator, we have included a list of skills and knowledge that are important in conducting an evaluation. Many such lists have been created, though none have been formally endorsed by professional associations of evaluators such as the American Evaluation Association (AEA). However, we believe that the evaluator competencies proposed by the International Board for Standards in Training, Performance and Instruction (detailed below) will be helpful to you when considering the qualities and skills you would like your program evaluator to possess.

It is highly unlikely that any one evaluator will have all of the skills associated with these competencies. In hiring or designating an evaluation lead, consider carefully the characteristics and skills that will be a good match for your program. For example, if working with your asthma coalition requires exceptional facilitation skills, you may want to look for an evaluator with strong interpersonal and facilitation skills. Or if the evaluator whom you feel is a good match for your needs has undeveloped skills in quantitative analysis, another person on your asthma team may be able to fill this gap.

Underlying all these competencies must be an ability to work in a culturally competent manner. See AEA's statement on cultural competence for guidance (http://www.eval.org/p/cm/ld/fid=92) as well as the "Other Evaluation Resources" section of the NACP website.

Evaluator professional foundations as identified by the International Board for Standards in Training, Performance, and Instruction
1. **Communicate effectively in Written, Oral and Visual Form**
    a. Use verbal and nonverbal language appropriate to the audience, context and culture
    b. Use active listening skills
    c. Choose appropriate technology to enhance communication
    d. Simplify and summarize complex information
    e. Facilitate meetings effectively
    f. Demonstrate effective presentation skills
    g. Write clearly and concisely

2. **Establish and Maintain Professional Credibility**
    a. Model exemplary professional conduct
    b. Demonstrate relevant organizational, business and industry knowledge
    c. Stay current with new thinking and approaches in evaluation-related fields
    d. Update one's professional skills
    e. Stay current with relevant technology
    f. Participate in professional activities related to evaluation
    g. Share knowledge and experience to develop evaluation skills in others
    h. Document one's own work as a foundation for future efforts, professional presentations or publication
    i. Establish and maintain professional networks

3. **Demonstrate Effective Interpersonal Skills**
    a. Be sensitive to cultural norms and organizational practices
    b. Establish and maintain effective working relationships
    c. Use consulting skills to clarify issues

    d. Use negotiation skills
    e. Use conflict resolution skills
    f. Monitor and respond to the dynamics of groups and teams

4. **Observe Ethical and Legal Standards**
    a. Comply with organizational and professional codes of ethics
    b. Comply with applicable laws and regulations
    c. Respect the need for confidentiality and anonymity
    d. Declare or avoid conflicts of interest
    e. Respect intellectual property including proprietary rights

5. **Demonstrate Awareness of the Politics of Evaluation**
    a. Identify the potential political implications of each evaluation
    b. Clarify stakeholder values
    c. Attend to political issues as they arise

Planning and Designing the Evaluation

6. **Develop an Effective Evaluation Plan**
    a. Describe the program, process, or product to be evaluated
    b. Identify the stakeholders
    c. Identify the evaluation focus and key questions to be answered
    d. Use best practices or relevant literature to guide the evaluation plan
    e. Describe the evaluation strategy and expected outcomes
    f. Identify models, methods or designs to support the evaluation
    g. Collaborate with stakeholders to confirm the selected approach to evaluation design

7. **Develop a Management Plan for the Evaluation**
    a. Develop the evaluation schedule, responsibilities and deliverables
    b. Determine the budget
    c. Identify internal and external personnel requirements
    d. Determine training needs of personnel
    e. Determine technology requirements
    f. Allocate personnel and resources to support the plan
    g. Develop a communication and reporting plan
    h. Obtain needed permissions regarding confidentiality
    i. Prepare and negotiate a proposal

8. **Devise Data Collection Strategies to Support the Evaluation Questions and Design**
    a. Identify potential data sources
    b. Draw on a variety of evaluation instruments and procedures
    c. Evaluate the appropriateness of using existing instruments and tools
    d. Construct reliable and valid instruments
    e. Develop a data collection plan, including protocols and procedures
    f. Design appropriate sampling procedures
    g. Address threats to trustworthiness and validity of data
    h. Develop a plan for data analysis and interpretation
    i. Plan for the storage, security and disposal of data

9. **Pilot Test the Data Collection Instruments and Procedures**
    a. Design the pilot test
    b. Identify an appropriate sample
    c. Implement changes based on feedback and results

Implementing the Evaluation Plan

10. **Collect Data**
    a. Implement the data collection plan, schedule and budget
    b. Document evaluation activities
    c. Conduct effective individual or group interviews
    d. Conduct effective observations
    e. Record and summarize relevant existing data
    f. Respond to changes in the scope or focus of the evaluation
    g. Minimize disruptions during data collection

11. **Analyze and Interpret Data**
    a. Assess the trustworthiness, validity and reliability of data
    b. Use appropriate quantitative or qualitative analysis procedures
    c. Review and interpret data in an unbiased way
    d. Make judgments about the findings and draw conclusions
    e. Develop recommendations

12. **Disseminate and Follow Up the Findings and Recommendations**
    a. Use multiple methods of communicating and reporting
    b. Discuss and interpret the evaluation findings with stakeholders
    c. Present the findings according to the needs of diverse audiences
    d. Facilitate or monitor changes resulting from recommendations

Managing the Evaluation

13. **Monitor the Management Plan**
    a. Adapt the plan to meet changing circumstances
    b. Review and adjust the budget, if needed
    c. Track evaluation progress against schedules
    d. Identify and resolve problems that arise during the evaluation
    e. Foster reflection and dialogue on the evaluation process and outcomes

14. **Work Effectively with Personnel and Stakeholders**
    a. Manage team members, consultants and technical experts
    b. Keep stakeholders informed of progress
    c. Keep the evaluation team engaged in and informed of the progress
    d. Debrief evaluation team and stakeholders to establish lessons learned
    e. Assess stakeholder satisfaction with the evaluation

Recruiting Your Strategic Evaluation Planning Team: Qualifications and Responsibilities

Below is a sample description of the qualifications and responsibilities for strategic evaluation planning team members. To use it in recruiting team members, tailor the specific details (time period, etc.) to your current evaluation projects.

The strategic evaluation planning team will consist of 4-6 individuals who are familiar with asthma work in the state. This team will be responsible for creating an evaluation strategic plan that will guide our evaluation work over the next five years, including identifying and prioritizing the program activities that are most important for us to evaluate in upcoming years. Planning team members will provide support and guidance to an evaluator (funded through our cooperative agreement with CDC, similar to our epidemiologist) and will have the support of CDC-based evaluation technical advisors.

As we create the team, we will aim for a broad mix of skills and perspectives. Experience with program evaluation is not required to participate on the planning team. An interest in evaluation and a commitment to ensuring that our evaluation resources are wisely invested and widely used *is* required.

We hope that team members can participate throughout the five-year period of our cooperative agreement with CDC, which funds much of our work. The time commitment will vary with the stage of planning, but members should generally plan to participate in one meeting per month.

Below is a list of qualifications and responsibilities for members of the team.

Qualifications

Members of the strategic evaluation planning team should have:

- Broad familiarity with the state asthma program, its partners, its goals, and its context (political, administrative, organizational, etc.).
- Responsibility for making or contributing input to important decisions about the program's focus, management, operations, or funding.
- A strong commitment to ensuring the dissemination and use of evaluation findings.
- The ability to maintain confidentiality.
- Respect and trust of other program stakeholders.

Roles and Responsibilities

Members of the strategic evaluation planning team will be asked to:

1. *Act as a champion for program evaluation.* Demonstrate to other stakeholders an interest in the process and products of evaluation. Reinforce the notion that evaluation activities are intended to be helpful to staff and other decision makers. You may find it necessary to reassure staff by emphasizing the distinction between a program evaluation, which assesses the activities and outcomes of the program, and a personnel review, which assesses staff performance.

2. *Ensure that a variety of perspectives is represented in evaluation planning.* Think broadly about the information needs and perspectives of stakeholders who are not represented in the planning process, particularly those who are often marginalized. In conversations with others, listen for what they are curious or concerned about. Consider their perspectives when prioritizing the evaluation questions to be included in the plan.

3. *Ensure the utility and feasibility of evaluation activities.* Work with the evaluator to plan evaluation activities that 1) will generate information that is truly useful to stakeholders, 2) can feasibly be answered given available resources and support, and 3) will be sufficiently comprehensive to present a full description of your program. Ensure that the evaluation methods proposed will be convincing and accessible to your program's many stakeholders.

4. *Monitor the implementation of the evaluation plan.* Participate in an annual review of the plan. Celebrate and publicize when plan milestones are met and, when they are not met, work with the evaluator to devise ways to redirect evaluation activities or revise the plan.

5. *Interpret evaluation findings.* Consider the various explanations for particular evaluation findings and identify the explanations that are most relevant to the program. Translate the findings, as well as the methods that produced them, for stakeholders who are unfamiliar with evaluation practice and terminology.

6. *Disseminate evaluation findings.* Identify appropriate audiences for evaluation findings as well as the most appropriate channels and formats for conveying them. Discuss findings in formal and informal settings and encourage others to consider and make decisions based on the findings and recommendations.

7. *Build internal evaluation capacity.* Communicate with others involved in the program the knowledge you gain through your participation on the planning team. Encourage them to use an evaluative approach to planning and conducting their work: "Are we doing the right things? Are we doing them right? And how do we know that?"

Compensation and Benefits

Active participation on the planning team will enhance the likelihood that your investments in evaluation activities will render information that is useful to you. It will also provide additional experience in the practice of evaluation that may be valuable in your work, whether as a producer or a consumer of evaluation information.

Recruiting Your Individual Evaluation Planning Team: Qualifications and Responsibilities

Below is a sample description of the qualifications and responsibilities for individual evaluation planning team members. To use it in recruiting team members, tailor the specific details (time commitment, etc.) to your current evaluation projects.

The individual evaluation planning team will consist of 3-6 people who are familiar with the aspect of the program being evaluated. Team members should represent a variety of perspectives, for example, someone with a direct connection to the program, whether as staff or participant; someone with a programmatic oversight role; a community partner; even a program critic. Ideally the team will include someone who is also serving on or connected with the strategic evaluation planning team. Building on the work done by the strategic evaluation planning team, this team will refine (or in some cases refocus) the evaluation questions identified in the strategic evaluation plan.

As we create the team, we will aim for a broad mix of skills and perspectives. *Experience with program evaluation is not required to participate on the planning team.* An interest in evaluation and a commitment to ensuring that our evaluation resources are wisely invested and widely used *is* required. Our professional evaluator, funded through a cooperative agreement with CDC, will provide resources and training to ensure that team members share an understanding of our approach to program evaluation and have the skills and information needed to contribute to the process.

We anticipate this evaluation will be ongoing for X months/years, with the bulk of the planning team's work in X and X. Depending on the tasks at hand, meetings may be held in person or by phone, and team members will occasionally be asked to complete tasks between meetings. Each member's degree of involvement will vary based on his or her expertise as well as the stage of the evaluation. We will do our best to make efficient use of the time you contribute.

Below is a list of qualifications and responsibilities for members of the team.

Qualifications

At least one member of the evaluation planning team should have responsibility for making or contributing input to important decisions about the program's focus, management, operations, or funding. All members should have:

- Familiarity with one or more aspect of the activity/program/policy being evaluated (e.g., direct operations as program staff or recipient/audience, important partners, goals, political or administrative context).
- Ability to participate productively on a team of program stakeholders who hold a variety of positions and perspectives and to respect the differing opinions those perspectives may foster.
- A strong commitment to ensuring the dissemination and use of evaluation findings.
- The ability to maintain confidentiality.
- Respect and trust of other program stakeholders.

Roles and Responsibilities

Members of the evaluation planning team will provide both guidance and support for the evaluator. They will be asked to:

1. *Act as a champion for program evaluation.* Demonstrate to other stakeholders an interest in the process and products of the evaluation. Reinforce the notion that evaluation activities are intended to be helpful to staff and other decision makers. You may find it necessary to reassure staff by emphasizing the distinction between program evaluation, which assesses the activities and outcomes of a program, and a personnel review, which assesses staff performance. .

2. *Ensure that a variety of perspectives is represented in evaluation planning.* Think broadly about the information needs and perspectives of stakeholders who are not represented in the planning process, particularly those who are often marginalized. In conversations with others, listen for what they are curious or concerned about. Consider their perspectives when prioritizing the evaluation questions to be answered by the evaluation.

3. *Ensure the utility and feasibility of evaluation activities.* Work with the evaluator to plan evaluation activities that 1) will generate information that is truly useful to stakeholders, 2) can feasibly be answered given available resources and support, and 3) will be sufficiently comprehensive to present a full description of your program. Ensure that the evaluation methods proposed will be convincing and accessible to your program's many stakeholders.

4. *Monitor the implementation of the evaluation plan.* Stay informed about the evaluation's progress. Celebrate and publicize when milestones are met and, when they are not met, work with the evaluator to devise ways to redirect evaluation activities or revise the plan.

5. *Interpret evaluation findings.* Consider the various explanations for particular evaluation findings and identify the explanations that are most relevant to the program. Translate the findings, as well as the methods that produced them, for stakeholders who are unfamiliar with evaluation practice and terminology.

6. *Disseminate and use evaluation findings.* Identify appropriate audiences for evaluation findings as well as the most appropriate channels and formats for conveying them. Discuss findings in formal and informal settings and encourage others to consider and make decisions based on the findings and recommendations. Work with the evaluator to create an action plan to implement the team's recommendations for the program.

Compensation and Benefits

Active participation on the planning team will enhance the likelihood that your investments in evaluation activities will render information that is useful to you. It will also provide additional experience in the practice of evaluation that may be valuable in your work, whether as a producer or a consumer of evaluation information.