

Selecting an Evaluation Consultant

No. 1 | updated August 2018

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

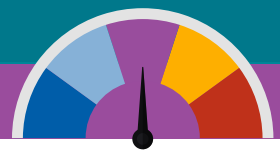
- Discuss with other agency staff and agree on the specific needs a consultant could address
- Follow your agency's policies and procedures (e.g., write a Request for Proposals; develop a contractual or consultant agreement, etc.) to specify
 1. Scope of work and schedule of deliverables
 2. Consultant 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



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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: <https://www.acf.hhs.gov/opre/resource/the-program-managers-guide-to-evaluation-second-edition>. Accessed October 10, 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>.