

How to Hire an Evaluator

It can be very beneficial to hire someone from outside your organization to lead the evaluation that is required of your Office of Minority Health (OMH) grant. Having an experienced evaluator on your team can bring more credibility, accuracy, and perspective to your project's evaluation process and findings. This publication offers some guiding principles for hiring an evaluator that is appropriate to your project's needs.

When Should I Hire An Evaluator?

Hiring an evaluator early in your grant's lifecycle is of the utmost importance. Involving the evaluator from the beginning of the project, or even during the grant application writing phase, will allow you and your staff to fully benefit from his/her expertise. It is important to recognize that ***it usually takes three to six months of evaluation planning and preparation before data collection can begin.*** By delaying the hiring process, your evaluator may not have sufficient time to capture all relevant data (e.g., baseline or pre-intervention data). Involving an evaluator during the application writing phase, or hiring one soon after your grant is awarded, will allow him/her to:

- **Gain a thorough understanding of the project.** An evaluator who is involved early has a better understanding of the intervention's design and intent, the inner workings of each of the project's components, and how the various components relate.
- **Select an appropriate evaluation design and measures.** Having a good grounding in your grant project will provide the evaluator with key insights into how your project's outcomes or impacts can be most effectively and efficiently measured. To ensure that the evaluation yields usable and analyzable data, an evaluator needs time to think through potential data sources and to review and update your project's evaluation questions.
- **Develop instruments and an effective/efficient data collection strategy.** Once the evaluation design and measures have been selected, individual questions or items need to be developed and organized into a questionnaire or other data collection instrument, and pilot-tested. Additional time is required if these instruments need to be translated into other languages. Ideally, all of this work should be completed before your project begins—especially if the evaluation includes a pretest or baseline data collection.
- **Obtain Institutional Review Board (IRB) approval.** In some cases, you will not be able to collect data until your procedures for protecting human subjects have been reviewed and approved by an IRB. The IRB review process cannot begin until all instruments and participant protection procedures have been developed.
- **Establish buy-in from program staff.** An evaluator will help introduce the evaluation to staff members and can also help them to perceive it as an important activity and not a distraction or burden.
- **Identify ways the evaluation can improve your grant.** An evaluator can help design internal project reporting processes and set milestones that you and your staff can use to determine if your project is progressing as intended, as well as identify areas that need improvement throughout the life of your grant.

What Should I Look For In an Evaluator?

There are some basic qualifications you can look for when determining who to hire as the evaluator.

- **Formal education.** Though few have formal education in program evaluation, most evaluators do have formal training in research methods, often with graduate-level coursework in evaluation methods.
- **Experience.** A qualified evaluator should have experience in evaluation methods, research skills, as well as specific experience with the populations and health issues being addressed. .
- **Evaluation philosophy.** There are various perspectives on the process and final purpose of evaluations. It is important to find an evaluator who understands your project and the purpose and objectives of the evaluation.
- **Communication skills.** Evaluators should be skilled at clearly presenting findings and conclusions to a variety of audiences, including but not limited to project staff and clients, funding agency representatives, and legislators.
- **Recommendations.** The process for hiring an evaluator is similar to that for hiring any employee. Carefully review the evaluator's resume and references to determine if he/she has experience conducting evaluations of projects similar to yours. In addition to trained evaluators or researchers, involvement of project participants and practitioners will help ensure that the evaluation is informed by those who have first-hand knowledge about the project and its participants as well as a stake in the project and its outcomes.

Like other professionals, evaluators may be specialized and more comfortable conducting an evaluation with a specific design, data collection mode, and topical area. The objective is to find an individual whose preferences, background, and training best fit your project's evaluation goals. If interviews and surveys will be conducted, persons who understand the culture and who speak the language of the target population may also need to be included.

Determining What You Need and Can Afford

Before soliciting for an evaluator, it is important to understand and clearly define your project needs and how much you can afford. When making these decisions, think about the following:

- **Cost.** Consider how much of the grant's resources should and can be devoted to the evaluation. If resources are limited, you can use an evaluator as a consultant, using his/her time only for key activities, such as: providing guidance on design, helping with data analysis, and writing the final report. Cost will vary depending on the experience and education of the consultant, the type of evaluation required, and the geographic location of your program. However, a good rule of thumb is for projects to budget about 10 to 15 percent of available funds for evaluation.
- **Evaluator's background.** Determine how much knowledge your evaluator needs in the grant's subject area. It is equally important to consider both the evaluator's experience with your grant's subject area and his/her general expertise in evaluation methodology.

Contracting and Working With an Evaluator

A major aspect of managing an evaluation is the development of a detailed contract with your evaluator. At a minimum, your contract should articulate the following:

- **Who "owns" the evaluation information.** You will need to specify who has ownership and to whom the information can be given. Release of information to outside parties should always be cleared with your OMH Project Officer (PO).
- **Publishing expectations and ownership.** Any plans for publishing the evaluation results should be discussed and cleared before articles are written and submitted for publication. First, review OMH's requirements on publishing. Then, discuss with the evaluator who the lead will be for any publications.
- **Who will perform evaluation tasks.** The contract should clarify who is to perform the evaluation tasks and the expected level of involvement between the evaluator and project staff.
- **Communication between evaluator and staff.** Clearly state the expectations for communication with the evaluator. Also, a detailed schedule of reports should be included, as well as the total number of meetings the evaluator will need to attend.

Overview and Checklist

The guidelines presented above are meant to provide an overview of important information to consider when hiring an evaluator. The information is not intended to be comprehensive, but rather to help program managers and staff members begin to think through the hiring process for an evaluator. Below is a checklist of steps that you and your staff should complete as you move from planning to hiring the evaluator who will lead the evaluation of your OMH grant project.

1. Determine the overall goals/objectives of the evaluation.
2. Identify what expertise is needed.
3. Determine the amount of resources that can be allocated to evaluation.
4. Write a scope of work that describes the position.
5. Solicit for evaluators.
6. Screen and assess candidates.
7. Conduct interviews.
8. Select the most qualified evaluator.
9. Meet with the evaluator to discuss deliverables, responsibilities, timeline, and costs.
10. Develop, review, modify, and approve the final contract.

Where Should I Look For an Evaluator/More Information?

To gather more information on what to look for in an evaluator and where you can find an evaluator, try visiting these resources:

- **Federal Agencies:** Many Federal Agencies conduct evaluation projects and may be able to provide assistance. Within the U.S. Department of Health and Human Services (<http://www.hhs.gov>) many Offices work with evaluators, including the Office of Minority Health (<http://minorityhealth.hhs.gov/>) that provides resources and guidance for how to plan and conduct evaluation. (Evaluation Planning Guidelines for Grant Applicants <http://minorityhealth.hhs.gov/Assets/pdf/Checked/1/Evaluation%20Planning%20Guidelines%20for%20Grant%20Applicants.pdf>; Evaluation Protocol <http://minorityhealth.hhs.gov/Assets/pdf/Checked/1/EvaluationProtocol.pdf>)
- **Colleges and Universities:** Colleges and universities can be a good resource, even if they do not have a designated Evaluation Department, as many of the professors have experience with evaluations or connections to evaluators.
- **Professional Associations:** In addition, you may find a private evaluator by searching for “Management Consultants” or contacting professional associations focused on evaluation and research, such as:
 - American Evaluation Association: <http://www.eval.org/>
 - American Educational Research Association: <http://www.aera.net/>
- **Additional Resources:** Other selected resources for additional information on evaluation include:
 - W.K. Kellogg Foundation Evaluation Toolkit: <http://ww2.wkkf.org/default.aspx?tabid=75&CID=281&NID=61&LanguageID=0>
 - The Centers for Disease Control and Prevention provides a set of evaluation resources in a variety of topical areas, available at: <http://www.cdc.gov/eval/resources.htm>.
 - Program Development and Evaluation (University of Wisconsin-Extension) <http://www.uwex.edu/ces/pdande/evaluation/>

References

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Juvenile Justice Evaluation Center. *Hiring and Working with an Evaluator*. Retrieved August, 2009, from <http://www.jrsa.org/pubs/juv-justice/evaluator.pdf>