

Guidelines for Engaging Evaluators

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Find the Right Evaluator

You will receive good work from Evaluators if you choose them carefully.

- Ask around. Word of mouth is a good way to obtain information about who has done good work in the past.
- Engage a known Evaluator who has done similar work in the past.
- Ask an Evaluator you trust to suggest someone.

Choose the Right Evaluator

When you have a list of people who might be interested in providing services to you, your next job is to choose the right person (or persons) to do the work. A good way to choose the most suitable Evaluator is through a selection committee. The committee's job is to choose and recommend the Evaluator who is most likely to do the best job at a reasonable cost.

The selection committee:

- contacts the Evaluators and sends them the project description and the terms of reference. The terms of reference outline your understanding of the job to be done, specify your Evaluation objectives, state the "product" you expect the Evaluator to produce and set a schedule for carrying out the Evaluation.
- invites Evaluators to send proposals. The proposal should outline how the Evaluator would meet your objectives, carry out the Evaluation and the cost to complete it.
- assesses the proposals. In assessing the proposals, the committee looks at how the Evaluator will meet your needs, the Evaluator's qualifications and the estimated cost.
- chooses a "short list" of up to four of the best people or firms from those who sent in proposals.
- interviews those on the short list, focusing on the Evaluator's expertise, knowledge of the project and the proposed fee.
- checks the Evaluator's references. The best references come from people and organizations for whom the Evaluator has worked. When checking the references, the committee should ask the following questions:
 - Were the contract terms honoured?
 - Was the work finished on time?
 - Was the work done within budget?
 - Were the recommendations or reports useful?
 - Was the Evaluator open and flexible to ideas and input from the client?
 - How well did the Evaluator work with the client?
- chooses the Evaluator. As a courtesy to other Evaluators who send in proposals, you should notify them that you have chosen someone else for the job.

Engage the Evaluator

An accepted proposal leads to a contract. A written contract provides the framework within which obligations, rights and remunerations are clarified. It clearly states who is responsible for what and helps prevent unpleasant surprises for both you and the Evaluator. When you and the Evaluator sign a contract, you're both part of a legal agreement. A contract serves your needs as well as the Evaluator's. You expect the Evaluator to do a good job, produce acceptable results and complete the work on time. The Evaluator expects to be paid promptly for the work he or she does.

The contract should cover:

- the names and responsibilities of both parties.
- fees and payment schedules.
- costs.
- deadlines.
- what the Evaluator is expected to deliver or produce.
- who owns what the Evaluator produces.
- to whom the Evaluator's report or other material may be released.

Work with the Evaluator

Provide a person as a point of contact for the Evaluator to:

- secure all internal documents to be provided to the Evaluator;
- assist with project communications to staff and other stakeholders;
- provide sounding board to Evaluator;
- monitor project progress and contract details; and
- sign off at project completion.

Evaluate the Results

When the Evaluator has finished the work for you, it's very useful to review the whole experience. Look at both the accomplishments and the problems. Did you get your money's worth? Questions to ask:

- Did the Evaluator fully honour the contract?
- Did the Evaluator come up with reasonable findings, conclusions and recommendations?
- Was the report clear and helpful?
- Did the Evaluation go smoothly without misunderstandings?
- Were expectations realistic?
- Did you and the Evaluator work well together?
- Did you allow enough money in the contract to complete the Evaluation?
- Would you hire this Evaluator again?
- Would you recommend this Evaluator to someone else?