Selecting 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 addresses when an external evaluator or evaluation team should be employed and what factors should be considered when selecting them. IDRC staff and management can call on the Evaluation Unit for support in identifying evaluators.

Selecting an external evaluator or evaluation team

Generally speaking, expertise, impartiality, cost, and time are key considerations for employing an external consultant or 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.

It may be possible to include both internal and external people within an evaluation. As an example, IDRC external program reviews require the program to write an evaluative report on their results and strategic decisions. Next, a panel of external reviewers both gathers evidence and uses its expert opinion to provide an assessment of the program's performance. The following tables present the main advantages and disadvantages associated with using an internal team member versus an external consultant.

Advantages	
Internal	**External**
Timely: The project/program immediately has information that begins informing decisions	**Perspective:** An external evaluation may provide a view of the project/program that is considered more objective by the intended users.
Buy-in: Those involved have the opportunity to have their voices heard and to contribute to the evaluation.	**Credibility:** An external evaluation may be perceived as having more credibility for people outside of the project/program (i.e., funding partners, stakeholders, etc.).
'Insider' perspective: An 'in-house' evaluator may be more familiar with the staff, community, issues, data sources, and resources associated with the project/program.	**Expertise:** An external evaluator or team may possess evaluation skills and knowledge that the internal team is lacking. They may also have exposure to a wider range of issues, methods, and practices that would be useful to incorporate.

Disadvantages	
Internal	**External**
Time consuming: Internal evaluations involve staff time that may draw on limited personnel resources.	**Cost and time:** External evaluations can be more costly than internal evaluations and it may be difficult to manage an evaluation conducted by an external evaluator.
Bias: There may be a perception of bias if the internal evaluator is 'too close' to the subject matter; this may result in risking the credibility of the evaluation and hindering its use.	**Knowledge and Expertise:** It may be difficult to find appropriate evaluators who understand the context and substance of research for development programming.

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. 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 it is clear in the terms of reference (TORs). You may want an external evaluator to design the evaluation and select an appropriate methodology, in which case it is helpful to articulate values and/or principles to be upheld in the process.

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

Evaluation Use	Evaluator Qualities
Accountability: The intention of the evaluation is to determine the worth or merit of a program or project.	The evaluator or evaluation team should possess qualitative and quantitative expertise and experience. Independence and credibility is of central importance.
Learning: The emphasis of the evaluation is on facilitating program and/or project improvements.	The evaluator or evaluation team must be reflective, be comfortable with concepts of adult education and organizational learning, and be willing and able to play the role of facilitator. They should also have quantitative and qualitative methodological expertise.
Innovation: The aim of the evaluation is to facilitate the design of new programs and/or projects based on what works.	The evaluator or evaluation 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
- Thematic and contextual knowledge and experience
- Research for development expertise and experience
- Multidisciplinary skills (e.g., economic, demographic, environmental, sociological)
- Ability to effectively communicate to the targeted users and audience
- Gender and cultural balance
- 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 requirements (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 and willing to share his or her role in the evaluation, and balance the responsibilities?
- Is the consultant willing and 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 that they are credible, competent, and capable of leading a useful evaluation process.

Make contact early! Good evaluation consultants are busy, so give them enough lead-time to fit in their schedules.