

Evaluation 101: Planning and Executing External Evaluation for Your Organization

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In This Webinar

- What is evaluation? Why evaluate?
- How to find and solicit a quality evaluator
- What will external evaluation cost?
- Working successfully with external evaluators

American Evaluation Association

“...evaluation involves assessing the strengths and weaknesses of programs, policies, personnel, products, and organizations to improve their effectiveness.”

Two broad categories:

- Formative evaluation
- Summative evaluation

External Evaluation

- Research conducted from outside of the program or organization
- Pros and Cons
- The goal of evaluation is...

LEARNING

Why Evaluate with an External Evaluator?

- Accountability
- Credibility
- No capacity internally

Planning for an External Evaluation

- Gather key stakeholders early
- Identify what to measure or assess
 - Research questions
 - Data to collect
- Use resources for planning:
 - <http://learningstore.uwex.edu/assets/pdfs/G3658-1.PDF>
- Hire consultants to help plan evaluation

Planning an Evaluation Budget

5 to 10 percent of the total program costs

- More or less with some factors:
 - Complexity
 - Data sources
 - Scientific rigor

Planning an Evaluation Budget

Sharing your planned budget amount with prospective evaluators

Pros:

- You can spend at or below what you planned

Cons:

- You limit the creativity of the proposals
- Little room for negotiating
- Some evaluators will not apply

Soliciting a Quality Evaluator

- Request for Proposals (RFP)
- Word-of-Mouth
 - Still requires a proposal that outlines the evaluation work

Finding External Evaluators

- Funder recommendations
- American Evaluation Association
 - <http://www.eval.org/p/cm/ld/fid=108>
- Campus faculty
- Grants office on campus
- Colleagues and networks

Requests for Proposal Process

- Establish a plan and project boundaries
- Identify stakeholders and advisors
- Write the RFP
- Create a scoring rubric
- Circulate RFP
- What to include and how to score:
 - www.techsoup.org/support/articles-and-how-tos/overview-of-the-rfp-process

Questions to Ask Prospective Evaluator

- How have you undertaken similar projects in the past?
- What methodologies would you recommend for an evaluation of this program/project?
- What is your approach and style?
- What is your capacity, and to what extent will associates do the work?
- Is there research/practice relevant to this program/project that you're familiar with?

Resources for an Writing an External Evaluation Contract

- What to include
 - Scope of work
 - Detailed tasks
 - Data ownership
 - Fees and Timeline
 - Reporting plan
- Checklist for negotiating a contract
 - www.wmich.edu/evalctr/archive_checklists/contracts.pdf

Working Successfully with your Selected Evaluator

- Communication – single point of contact
- Establish monitoring strategies in collaboration
- Get input from participants about the evaluators
- Using meetings effectively

Getting What You Need

- **Focus on Learning**
 - Answers to your questions
 - Information to improve programs
 - Reports you can share with stakeholders
- **Emphasize Capacity Building**
 - Use expertise and recommendations
 - Engage all stakeholders in findings

For More Information:

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