

## Preparing to Hire an Evaluation Professional

*This backgrounder provides further information to organizations that are thinking about hiring an evaluator. It provides tips for hiring, selection criteria and suggested qualifications.*

### When does it make sense to do an in-house evaluation?

- When your project is simple and the monitoring and evaluation requirements are not extensive.
- When you are able to incorporate basic evaluation planning into the day-to-day work of your financial literacy staff.
- When you think it is important to develop the evaluation skills internally (the evaluation process becomes a learning process for your organization).
- When you control the agenda (... and it does not matter if you finish your evaluation process 6 months later than planned).
- When you have access to a volunteer and/or board member with evaluation experience, who can provide their professional guidance and judgment.

### When does it make sense to hire an evaluation professional?

- When you do not have the in-house expertise to plan and implement a monitoring and evaluation strategy.
- When your staff do not have the time to focus on the evaluation.
- When your project is very complex and outcomes are less tangible and difficult to document.
- When your funder requests a professional, external evaluation.
- When there is a serious problem with your project, and you need a strong, objective voice to assess the situation, navigate conflict and provide practical solutions.
- When you are seeking to demonstrate the effectiveness of an approach with the goal of making the case for policy change.
- When you want to encourage the broad based adoption of the approach by other organizations.

### Tips for preparing to hire an evaluation professional

- Clarify the role of the evaluator: is it to take on the day-to-day work involved in your evaluation, or to support your staff in this work?
- Be clear about the type of approach you would like your evaluator to adopt.
- Interview candidates, look at samples of their work and check references.
- Depending on your level of confidence and evaluation expertise, you have different choices and options in the way you hire evaluation expertise:
  - You can hire someone in-house (as a staff person)
  - You can hire an external evaluator/consultant

- You can hire evaluation expertise for different purposes depending on your budget and the technical skill of your program staff:
  - As a planner at the front end to shape the process and to get you started
  - As a coach to see you through the whole process while you do most of the ‘leg work’
  - As an external evaluator to plan and conduct the full evaluation
- Have a look at the job ads on The Canadian Evaluation Society (CES) website [CES job listings](#). You can also post your job ad there for free.
- If applicable, have candidates prepare an evaluation proposal.

### **Preliminary draft of criteria for candidate review and selection**

Your team can review and revise the following criteria; you might also want to add weighting to each of the areas:

- Review of CV – Candidate meets minimum qualifications stated.
- Quality of the proposal (if applicable) – including the effectiveness of suggested evaluation approach.
- ‘Fit’ with the values and scale of your organization.
- Understanding of financial literacy, adult learning, consumer protection, and poverty-reduction approaches.
- Clear understanding of your project and organization.
- Demonstrated experience with statistical performance monitoring systems.
- Demonstrated interest in participatory evaluation approaches; ability to work with vulnerable and low-income populations.
- Value and cost: proposal is within the budget and the consultant is not too expensive (depending on their experience, typical evaluators’ fees can vary between \$500 and \$1200/day).
- Availability in terms of geography and time (in a multi-year project): it is worth inquiring about how busy they are now, and how available they will be over the life of the evaluation.
- Ability to write/communicate well.

### **Suggested qualifications for the evaluation professional**

- A Master degree (with a research or evaluation component) or other appropriate qualifications (contact The Canadian Evaluation Society for more info).
- Professional experience working with projects and evaluations related to the social sector (social and economic development, education etc.)
- Practical knowledge of program evaluation methodology (min. two years’ experience developing monitoring and/or evaluation plans).
- Ability to design and implement evaluation tools including monitoring databases, questionnaires, focus groups, key stakeholder interviews and other methodologies.
- Ability to coach and explain complex concepts to staff and volunteers.
- Effective verbal and writing skills.
- Ability to adapt to changing work priorities and to balance multiple deadlines.

*You should definitely do reference checks for the selected candidate. Have a look at a sample of the consultant’s work (e.g. a written report).*