



# Evaluator Screening Tips

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## Introduction

Well-designed, systematic evaluation is essential to successful SIF programs, and hiring an evaluator to carry out this evaluation can be a challenging, but rewarding experience. This document contains information on what to look for in terms of evaluator experience and expertise, and tips on using the internet and references to help screen applicant evaluators. It also contains links to resources on locating an evaluator, soliciting and reviewing applications from potential evaluators, and hiring an evaluator who will meet your needs.

## What to Look for in a SIF Evaluator

The right evaluator for your SIF-funded program should have experience and background that is aligned with your program's content, size, scope, and information needs. When selecting and screening your evaluator, you will need information about the following items (at a minimum):

- The evaluator/team's prior experience with similar evaluations.
- The extent to which the evaluator/team has sufficient capacity to conduct the proposed evaluation, in terms of technical experience and the size/scale of the evaluation.
- Any potential evaluator or subgrantee conflicts of interest.

Although you can ask potential evaluators to provide this information to you directly (e.g. through a Request for Quotes process), you should also take steps to verify what the evaluator tells you, and find out more about them. Ideally, your screening process should include these steps:

- 1) Solicit and review responses to a specific statement of work (e.g. a Request for Proposals or Request for Quotes). See pages 2 and 3 of [Hiring the Right Evaluator for your National Service Program](#) for tips.
- 2) Conduct research into your top three or four choices, including:
  - a. An internet search
  - b. Review of their written articles or reports

(See the sample at the end of this document for topics to consider when conducting research.)



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- 3) Ask clarifying questions of your top choices to ensure that you fully understand their background, experience, and abilities. See pages 4 and 5 of [Hiring the Right Evaluator for your National Service Program](#) for tips.
- 4) Check references to find out more about their working style, approach to evaluation, and any other issues. See page 6 of [Hiring the Right Evaluator for your National Service Program](#).

## Online Searching Tips and Checklist

A substantial amount of useful information about a prospective evaluator can often be found online; however, be careful as you examine the search results. Names can be similar, so make sure you are looking at information about the same person as you review each search result. Consider the following when searching for key information about an evaluator on the internet:

- **Background:** Search directly for the evaluator by name. Look for information about the evaluator's background and experience via personal websites, Google Scholar, LinkedIn profiles, and job-related sites.
- **Publications:** Find a list of the evaluator's publications. An evaluator's personal or professional website may list their publications. Look at the titles of their research reports and other publications to find out what type of research and evaluation work they have done and what methods they have used. You may need to look at the actual contents of reports to get more detailed information. Sometimes these reports are posted online and can be downloaded free of charge or for a nominal fee.
- **Teaching:** If the evaluator is a college or university instructor, find out what courses they have taught. This can provide clues as to their research interests, approaches, and technical proficiencies (i.e., courses in research design, research methods, statistics, interviewing, or other research skills may be good indicators of the types of research s/he has expertise in).
- **Clients and Funders:** Check evaluators' websites for lists of evaluation clients and funders (e.g. foundations and associations) with whom the evaluator has worked. These sites may also list publications or more thorough descriptions of projects. Search by project title or research area on these websites, as well as by evaluator name and institution or firm.



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- **Other sources:** Check any related links on organizations the evaluator has worked with. If an Institute or Think-tank is listed, look to see if that organization has posted reports or information on the project the evaluator has worked on. Co-authors, research team members, professional organizations, etc. may also have copies of publications or other information.

Expect to spend a couple of hours searching online and reading information about an evaluator. Also, remember that the internet may not have everything there is to know about a particular evaluator. For example, the web may give you a list of the evaluator's publications, but you may need to go to the library or pay to download journal articles if you want to see the actual contents of an evaluator's publications.

## Reference Check Tips and Checklist

References provided by the evaluators can be very useful sources of information, however, you should bear in mind that evaluators will provide references that they believe think well of them and their work. When checking references consider the following issues:

- **Organizational policy:** Ensure that you comply with any policies or templates your organization may have regarding reference checks for subcontractors and consultants.
- **Multiple references:** Ask for three to four references, and endeavor to speak with two or three, as some may not reply in a timely manner. It may be useful to ask for references who can speak to different aspects of an evaluator (e.g. approach to work, customer service, technical knowledge).
- **Open-ended questions:** Where possible, ask open-ended questions (e.g. "How did the evaluator approach the task", rather than "how well did they do", or "did they do this task") as these can provide more information about the evaluator's approach, expertise, and working style.
- **Descriptive information:** Ask references for descriptive information about how the evaluator worked with them and what their approach was to working together.
- **Expertise:** Consider the level of expertise of the person providing the reference when weighing answers on technical questions. If you are concerned about an evaluator's level of technical knowledge/experience (e.g. experience with statistical modeling, propensity score matching or Regression Discontinuity designs) it may be useful to ask evaluators to provide at least one reference who can speak in-depth about their technical expertise. Make sure you have someone involved in reference checks who can make judgments about technical expertise on these calls where possible.



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## Resources on How to Find and Work with an Evaluator

The following resources may be helpful in thinking through the search process.

Social Innovation Fund Knowledge Network on *Finding an Evaluation Consultant or Staff Member*

<http://siflearningcommunity.ning.com/forum/topics/where-to-look-for-an-evaluation-consultant-or-perhaps-a-part-time>

*Hiring the Right Evaluator for your National Service Program*

(This document contains a useful description of process, including step-by-step guidelines for hiring an evaluator.)

[http://www.nationalservice.gov/sites/default/files/resource/Hiring\\_the\\_Right\\_Evaluator.pdf](http://www.nationalservice.gov/sites/default/files/resource/Hiring_the_Right_Evaluator.pdf)

Knowledge Network Evaluation Resources: presentation topic, *Managing an External Evaluation*, and supplemental resources including a sample RFP, statement of work and evaluator assessment form.

[http://www.nationalservice.gov/resources/evaluation/planning-evaluation#Managing\\_an\\_External\\_Evaluation](http://www.nationalservice.gov/resources/evaluation/planning-evaluation#Managing_an_External_Evaluation)

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## Evaluator Information Worksheet<sup>1</sup>

Evaluator/Team's Name \_\_\_\_\_

Background Questions:	Notes and Sources		
	Evaluator Self-Report (or Proposal)	Internet Search	References
<b>Experience:</b> 1) What is the evaluator's background and experience? 2) Has the evaluator ever worked with a program like yours (program focus, program size, population, etc.)? 3) Does the evaluator have experience with the type of research design you wish to employ?			
<b>Appropriate academic preparation and professional qualifications:</b> 1) What academic field is the evaluator trained in, and what is the highest degree s/he has earned in the field? 2) What other information can you find on the evaluator's professional qualifications, such as certifications, awards, etc.?			

<sup>1</sup> For evaluation firms with multiple staff, search for information on the staff member listed as the principle investigator, project director, or project manager in the proposal provided by the evaluation team. When filling out this table, it may be helpful to focus on the background and experience of this main individual, but it may also prove useful to obtain information about any other staff included in the plan who will play substantial roles in the evaluation.

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Background Questions:	Notes and Sources		
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<p><b>Familiarity with programs like yours (similar program content, size, design, etc.):</b> Based on their publications, what is the evaluator likely to know about your program or programs similar to yours in mission or intent?</p>			
<p><b>Familiarity with your preferred research design and methods:</b></p> <ol style="list-style-type: none"> <li>1) Does the evaluator’s publication record show experience conducting evaluations that employ the same (or similar) research designs and methods to those you wish to use in your own evaluation?</li> <li>2) Does the evaluator appear to have experience collecting and analyzing similar types of quantitative and/or qualitative data as you anticipate collecting for your own evaluation?            Including, as appropriate:           <ol style="list-style-type: none"> <li>a. Online, paper or phone surveys</li> <li>b. Structured or unstructured interviews</li> <li>c. Focus groups</li> <li>d. Existing administrative data (e.g. data similar to that collected by your program) or publically accessible data sets (e.g. your state’s or school districts standardized</li> </ol> </li> </ol>			

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Background Questions:	Notes and Sources		
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<p>testing system data, Youth Risk Behavior Survey, Unemployment Insurance Data)</p> <p>e. Missing data techniques such as Full Information Maximum Likelihood (FIML) or multiple imputation</p> <p>3) Does the evaluator have experience with experimental or quasi-experimental design that will allow him/her to develop and implement evaluations that will achieve moderate or strong levels of evidence within the timeframe of your SIF-funded program? Including experience with a range of designs such as:</p> <ul style="list-style-type: none"> <li>a. Randomized Controlled Trials</li> <li>b. Regression Discontinuity Designs</li> <li>c. Propensity Score Matched Designs</li> <li>d. Comparative Interrupted Time Series Designs</li> <li>e. Difference in Difference Designs</li> <li>f. Designs using Coarsened Exact Matching</li> </ul>			

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Background Questions:	Notes and Sources		
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<p><b>Usefulness of previous evaluation reports:</b></p> <ol style="list-style-type: none"> <li>1) How clear, organized, readable, and potentially useful for decision-making are the evaluator’s previous reports?</li> <li>2) Is it clear how the evaluation results could be used to help a program improve?</li> </ol>			
<p><b>Existing Clients/Conflicts of Interest:</b></p> <ol style="list-style-type: none"> <li>1) Who are the evaluator’s current and recent clients?</li> <li>2) Who/what organizations are in a position to influence the evaluator professionally (i.e., are they operating within a university structure or a larger organization)?</li> <li>3) What are the evaluator’s core professional philosophies and interests?</li> <li>4) Do any current clients/influencers have a potential for creating a conflict of interest?</li> <li>5) Do the evaluator’s core professional or philosophical leanings present the potential for conflicts of interest (e.g. does their prior work indicate that they a key proponent or opponent of your program approach)?</li> </ol>			

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Background Questions:	Notes and Sources		
	Evaluator Self-Report (or Proposal)	Internet Search	References
<p><b>Approach to work:</b></p> <ol style="list-style-type: none"> <li>1) How do they prefer to work (e.g. remotely, face-to-face, alone, in a team)?</li> <li>2) To what extent do they anticipate collaborating with program staff to complete evaluation tasks (e.g. planning, data collection)?</li> <li>3) What is their preferred communication style?</li> <li>4) What approach do they take to addressing problems encountered during the evaluation?</li> </ol>			