# 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](http://www.evaluationcanada.ca/site.cgi?EN;4;6).  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).*