

Chapter 3. Engage an Evaluation Team

What's Inside?



What this chapter contains

- A discussion about identifying and engaging people with an interest in your program in the evaluation
- A description of several approaches to developing an evaluation team
- A plan for securing and working with an external evaluator
- Examples of ways to apply culturally responsive and equitable principles to evaluation team engagement
- A discussion of potential hurdles related to evaluation and how to overcome them

Who can use this chapter

Program managers working to bring together a group of individuals who will guide and conduct a program evaluation

Click the links below to view the relevant section

[Practice Culturally Responsive and Equitable Evaluation When Engaging an Evaluation Team](#)



[Hire and Manage Your External Evaluator](#)



[Introduction](#)



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Introduction

Like most work in human services, evaluation requires a team effort with many individuals contributing expertise and knowledge to generate credible, relevant, and actionable findings. Typically, this team includes individuals with professional evaluation skills and experience, individuals with strong program knowledge, and individuals with experience collecting data on program implementation and outcomes.

Participatory evaluation¹ focuses on creating meaningful roles for people affected by an evaluation in the design, execution, and application of research. It acknowledges and addresses power differentials and considers the diversity of experiences and perspectives within an evaluation team. For example, past program participants, community leaders, and advocates may help shape the evaluation questions, identify important measures and outcomes, and provide their perspectives to interpretations of evaluation findings. When done well, collaborative evaluations build team capacity and better reflect the lived experiences and expertise of individuals served by the program being evaluated.

This chapter focuses on how to identify interested parties and engage them in program evaluation, factors to consider when selecting internal or external evaluators, and the roles of various evaluation team members. This chapter also provides more information and advice about securing and working with an external evaluator and how to address potential challenges.

Decide Whom to Engage in Your Evaluation

Build your evaluation team to meet your information and knowledge goals. The size and membership of your team will vary based on expertise, budget, timeline, and/or outside requirements (e.g., program, evaluation funder requests). Identifying individuals who are interested in the program and the evaluation will help you effectively design the evaluation; collect the best evidence; analyze it appropriately; and share progress updates, products, and reports.

Identify People With an Interest in Your Program

All program evaluations benefit from the engagement and participation of individuals who have an interest in your program, how it operates, and the evaluation findings. These individuals are often grouped under the umbrella term “stakeholders.” Because this term can refer to a wide range of individuals with different goals, perspectives, relationships to the evaluation, and levels of power or authority, this Guide uses more specific terms to describe individuals’ relationships to a program. Broadly, this chapter refers to three groups, though individuals may belong to more than one:

- Those engaged in program operations (staff, staff at referral organizations, organizational leadership, or curriculum or program developers)

¹ Community Tool Box (2022) explains that participatory evaluation involves the individuals affected by the program or policy in the evaluation process. It acknowledges and addresses power differentials and considers the diversity of experiences and perspectives within an evaluation team.

- Those served or affected by the program (current participants, past participants, individuals who qualify for but have not taken up services); see [Practice Culturally Responsive and Equitable Evaluation When Engaging an Evaluation Team](#) at the end of this chapter for more information about including community members in your evaluation team
- Other intended users of the evaluation findings (current and future funders, policymakers and legislators, researchers, and evaluators)

Your evaluation team may engage representatives from the above groups in different ways:

- **Provide critical context and background to an evaluation plan.** For example, long-time community residents might share the community's history with evaluation and research and reveal whether previous partnerships with evaluators left a negative impression.
- **Provide input on an evaluation's design.** For example, current program participants can help identify outcomes of interest relevant to those served or affected by the program, such as increased connections to other parents in the community.
- **Participate in the implementation of an evaluation.** For example, you may hire and train community members to co-facilitate focus groups to create opportunities for program participants to engage with individuals who reflect their lived experiences.
- **Help contribute to the interpretation of evaluation findings and ensure findings are contextualized.** For example, program staff can share insights into local policy changes, such as waitlists at a local childcare center that may influence a program's ability to improve employment rates. Without this knowledge, the evaluation may overlook an important contributing factor affecting changes in participant employment.
- **Ensure evaluation findings are meaningfully shared.** For example, policymakers who are engaged in the evaluation may be more likely to share findings with their colleagues and draw from them in future decision-making efforts.

Having people who are interested in your program participate in your evaluation is not an all-or-nothing effort. Rather, engagement activities can be viewed as options along a continuum, ranging from providing information, to co-creation, to execution of an evaluation (see figure 3.1). The level of participation may vary throughout the life of the evaluation, across different groups of people, and even across representatives of the same group.

Who should work on your program evaluation?

This chapter uses several terms to describe the people who should be part of an evaluation. The term evaluation team refers here to all the people who will be at the table during decision-making, including focusing the evaluation, troubleshooting, and monitoring evaluation progress, interpreting findings, and communicating and using findings. That group should include project managers, project staff, people with evaluation expertise (see below) and other individuals such as community members.

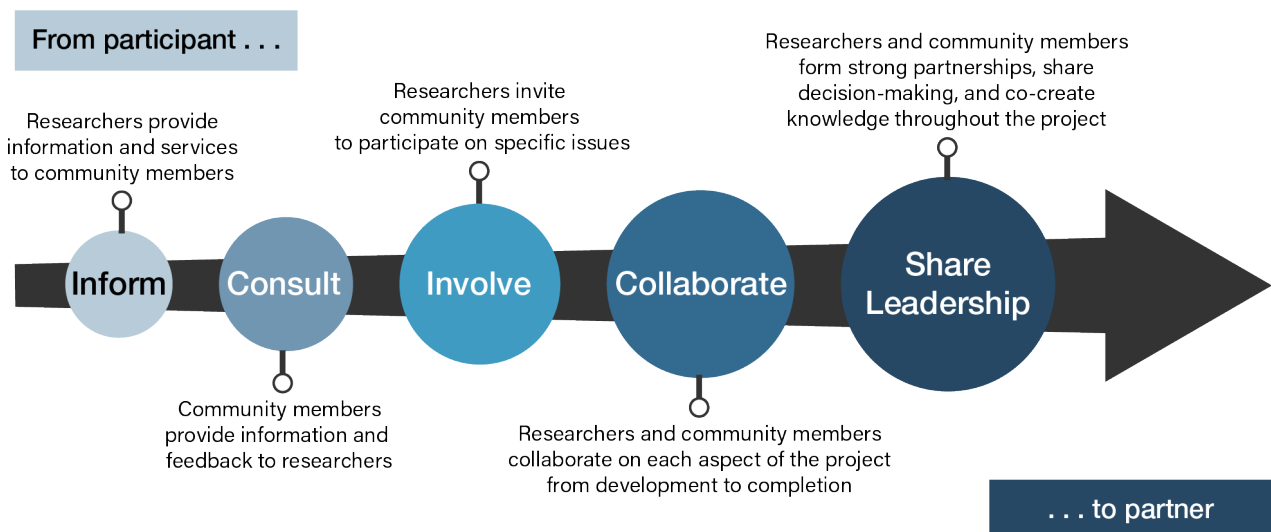
The term evaluator describes the person, set of persons, or organizations with the specific technical and subject matter expertise and knowledge to execute an evaluation (see section [Choose an Evaluator](#)). They are members of your larger evaluation team and should work with the other members of the evaluation team to successfully complete your program evaluation.

Many benefits can accrue from including community members and others in your evaluation. Evaluation findings are more likely to document program participant experiences accurately and align with participant goals when community members participate in the planning stages. Program staff may be more likely to integrate evaluation findings into their routine operations when they have been meaningfully engaged in the process. These benefits will ultimately help you conduct stronger and more useful evaluations.

However, you should also consider the potential challenges. Community engagement can affect your evaluation budget because participatory evaluation activities take significant time and effort. Ensure your timeline and budget align with your expectations for community engagement. It is also important to maintain independence and objectivity to ensure rigorous standards (OPRE, 2021). You can prepare for and respond to concerns about independence by being transparent. Clearly communicate to community representatives and the evaluation team about the level of influence, guidance, and input you expect (see figure 3.1 for one way to conceptualize different levels of engagement).

Document where community members have input in the evaluation (such as helping to revise measures) and where they do not (such as requesting certain findings not be made public). Share that information in final public reports. This approach will help ensure each team member understands their role and creates transparency about how you use input and feedback.

Figure 3.1. Continuum of Engagement in Evaluation



Source: Home Visiting Applied Research Collaborative (2018)

Choose an Evaluator

Your evaluation team will likely include people served or affected by the program, program staff, you as the program manager, and evaluation subject matter experts as evaluators. A single individual, a group of individuals, or an entire organization or firm with technical and subject matter expertise can execute an evaluation. See figure 3.2 for various groups that should have representation on your evaluation team.

An evaluation can be conducted by internal or external evaluators. Internal evaluators are members of the program being evaluated. They may be staff at your organization or otherwise affiliated with your organization or the program, such as staff who develop your curriculum. External evaluators do not have a role within your organization or the program. They may be researchers at universities, evaluation firms, or independent consultants.

Figure 3.2. Potential Evaluation Team Composition



Federal expectations for grantee evaluations

The Administration for Children and Families (ACF) provides funding to many programs. Often, funding recipients are required to conduct or participate in evaluation efforts.

Common requirements follow:

- Using specific constructs (e.g., elements such as depression) or measures (e.g., the specific item used to measure depression) to collect data common across grant recipients
- Engaging an independent, third-party evaluator
- Engaging in evaluation technical assistance as provided by ACF or a contractor
- Developing evaluation plans for ACF to review and approve
- Participating in a national evaluation of multiple grant recipients

Your selection of an evaluator (including teams or groups of evaluation staff) will depend on factors such as internal evaluation capacity, budget, and availability of external evaluation options. You should weigh the relative importance of having an evaluator with insider knowledge of the program (an internal evaluator) against the perceived objectivity, neutrality, and credibility associated with an externally conducted evaluation. Your evaluator selection will need to align with funder requirements, including the evaluator's ability to work with an institutional review board (IRB)² (see [chapters 5 and 6](#) for more information). Double-check all funder

² Institutional review boards are administrative bodies established to protect the rights and welfare of human research subjects recruited to participate in research activities conducted under the auspices of the institution it is affiliated with (Oregon State University, n.d.).

requirements related to evaluators' capacities and affiliations to ensure your plan complies with your funding agreement.

Table 3.1 describes three potential options for subject matter expert evaluators. In addition to all the other members of your evaluation team, you may choose to select an external evaluator or an internal evaluator, or have both external and internal experts work together as evaluators. Whichever choice you select, the evaluator(s) will join your larger evaluation team, which includes you as the program manager providing management of the evaluators, offering program expertise, and maintaining representation of program staff.

Table 3.1. Types of Evaluators

Considerations	Option 1: External Evaluator	Option 2: Internal Evaluator Supported by External Evaluator (Consultant)	Option 3: Internal Evaluator
Possible advantages	<ul style="list-style-type: none"> Can be considered more objective or credible than other options Can bring more technical expertise than internal evaluator Can be more efficient than internal evaluator because of experience with evaluation Can offer new perspective and unique insights better than internal evaluator 	<ul style="list-style-type: none"> Can (sometimes) be less expensive than an external evaluator alone Can increase likelihood evaluation is consistent with program objectives and needs of target population compared with external evaluator alone 	<ul style="list-style-type: none"> Can (sometimes) be least expensive option of three Can increase engagement and participation of program staff compared with external evaluator Can build organizational capacity for future evaluation efforts compared with external evaluator alone
Possible disadvantages	<ul style="list-style-type: none"> Can be more expensive than internal Can increase risk, compared with internal evaluators, because evaluator may not have adequate understanding of program components or target population 	<ul style="list-style-type: none"> Can increase burden for program staff Can be considered less objective than external evaluators alone 	<ul style="list-style-type: none"> Might lack sufficient knowledge or experience to design and implement the evaluation Can be considered less independent, objective than an external evaluator

The remainder of this chapter focuses on engaging and working with an external evaluator. If all your evaluation subject matter expertise on your evaluation team will come from internal staff, the rest of this chapter may be less relevant to your evaluation. Feel free to skim or skip to [chapter 4](#).

Hire and Manage Your External Evaluator

If you decide to work with an external evaluator, you will need to identify and hire that support. This section will guide you through the process.

Find an External Evaluator

Four basic steps are useful for finding an evaluator. These steps are similar to those you would use to recruit and hire new program staff. Public agencies may need to use a somewhat different process and work with other divisions of the agency. If you are managing a program in a public agency, check with your procurement department about regulations for hiring outside evaluators or consultants.

Step 1

Develop a job description

The first step in the hiring process is to develop a job description showing the materials, services, and products you expect an evaluator to provide, including the activities the evaluator will be expected to perform, the general budget, and an estimated timeline. Evaluator responsibilities may include the following:

- Develop an evaluation plan.
- Secure evaluation permissions (such as IRB approvals).
- Manage the evaluation team.
- Lead community engagement in evaluation efforts.
- Provide progress reports.
- Develop data collection instruments, forms, and procedures.
- Collect and analyze data.
- Write reports.
- Participate in communication efforts to share information about the evaluation.

In some cases, a job description is sufficient. In other cases, you may need to work with agency procurement offices to develop a request for proposals (RFP). If you need assistance in developing a job description, consider asking another organization with experience in hiring outside evaluators. Advisory board members could also assist with this task.

Step 2

Locate sources for evaluators

After you have created a job posting for an evaluator, the next step is to develop a strategic recruitment strategy. You can find evaluators through numerous channels, such as the following:

- **Professional associations.** Some examples include the [American Evaluation Association](#) (AEA), the [American Sociological Association](#), the [Association for Public Policy Analysis & Management](#) (APPAM), and the [Society for Research on Child Development](#). Several of these professional associations can support recruitment efforts. For example, AEA provides a [Find an Evaluator](#) search tool to connect interested agencies with member evaluators. APPAM provides a [Job Board](#) where you can post your needs (for a fee). Some of these organizations can provide a list of members located in your area (for a fee) and/or offer tips on how to tailor advertisements to attract an evaluator who best meets your needs. Additional information on these organizations appears in [appendix A](#).
- **Other agencies that have used outside evaluators.** Agencies in your community may be able to recommend an external evaluator, suggest methods of advertising, and/or provide other useful information. These agencies can represent one of the best ways to find an evaluator who understands your program and is sensitive to the community you serve.
- **Evaluation divisions of state or local agencies.** Most state or local government agencies have planning and evaluation departments. You may be able work with individuals from these agencies on your evaluation. Some evaluation divisions offer their services at no cost as an “in-kind” service. If they are unable to respond to an RFP or provide you with in-kind services, staff members may be able to direct you toward other organizations interested in conducting outside evaluations.
- **Local colleges and universities.** Departments of sociology, psychology, social work/social welfare, education, public health, public administration, and university-based research centers are all possible sources for locating an external evaluator. Well-known academic researchers affiliated with these institutions may be readily identifiable. Even if they cannot personally assist you, they may be able to refer you to a colleague with interest in performing local program evaluations.
- **Technical assistance providers.** Some federal grant programs include a national or local technical assistance provider. If your agency is participating in this kind of grant program, assistance in identifying and selecting an evaluator is an appropriate technical assistance request.
- **Research institutes and consulting firms.** Many experienced evaluators are part of research institutes and consulting firms. Try entering “program evaluation firms” or “human service evaluators” in a search engine. ACF also provides information about grant recipient evaluations on their various program office web pages. You can browse these reports to identify firms that partnered with other grant recipients. Federal evaluation clearinghouses such as the [What Works Clearinghouse](#), the [CLEAR Clearinghouse](#), and the [Title IV-E Prevention Services Clearinghouse](#) maintain lists of studies that they review. Each site provides a way to see the citations of the studies that contribute to the evidence of the programs or approaches under their purview. By reviewing those lists, you can generate names of evaluators who might be a good fit to evaluate your program. Finally, your state human services departments may have a list of firms that have bid on recent contracts for evaluations of state programs they can provide a list of approved vendors on their procurement website.

- **National advocacy groups and local foundations.** Some examples include [United Way](#), [American Public Human Services Association](#), [Child Welfare League of America](#), and the [National Urban League](#). The staff and board members of these organizations may be able to provide you with names of local evaluators. They may also offer insight into evaluations that were done well or evaluators particularly suited to your needs.

Step 3

Advertise and solicit applications

After you have developed a job description or RFP, identified possible sources for evaluators, and found ways to advertise the position, you are ready to post an advertisement and solicit applications. You can distribute your request for an evaluator through many channels. For example, use social networks (Facebook, Twitter, LinkedIn), professional networks, or collaborations with your local government's human resource department (if you are a public agency). Depending on your agency's procurement rules, you may also be able to email the job description or RFP directly to evaluators and/or evaluation firms you identified in step 2 asking them to respond to your request.

Advertise as widely as possible, particularly if you are in a small community or you are undertaking an evaluation for the first time. Using several advertising sources increases the likelihood of receiving many responses. You should build in as much time as possible between posting the position and when you plan to review applications.

If you have sufficient time, consider a two-step process for applications. For example, you can release a complete solicitation and ask potential respondents to submit a letter of intent several weeks before their applications are due. This helps you gauge the number of potential respondents and either revise your plans to accommodate a higher-than-expected number or increase advertising efforts if you receive fewer than expected. Alternatively, you can ask first for a one- to three-page initial proposal from applicants. Then, you can review these short proposals and identify the top candidates to receive the full solicitation or job description. This will reduce the number of lengthy applications you need to review.

Step 4

Review applications and interview potential candidates

In reviewing applications, consider the candidate's writing style, type of evaluation plan proposed, language (jargon free), experience working with your type of program and staff, familiarity with the subject area of your program, experience conducting similar evaluations, and proposed costs.

After you have narrowed your selection to two or three candidates, you are ready to schedule an interview with each finalist. This interview will give you an opportunity to determine whether you, your staff, and the evaluator are compatible. Like other job applicants, you will need to check references from other programs that have worked with your candidate. If you are hiring a firm, ask for past client referrals and contact those references.

Despite best efforts, you may encounter difficulties in hiring an outside evaluator, including the following:

- **You receive few or no responses to your advertisement.** Many programs, particularly those in isolated areas, can struggle to obtain even a few responses to their advertisements. Be sure to circulate your advertisement widely, using organizational and professional memberships, networks, contacts, and social media accounts. If you sent your job description or RFP to specific evaluators or evaluation firms, consider following up and asking why they decided not to respond to the solicitation. You might make adjustments to address these concerns, such as extending the due date, revising contractual requirements, or reducing the scope or number of evaluation questions. If you have access to evaluation technical assistance or have a funding agency, you can ask for feedback or suggestions from those organizations.
- **The outside evaluator's proposed costs are higher than your budgeted amount.** Evaluations can be tricky to budget. You may find the evaluators responding to your solicitation estimate the work will be significantly more expensive than you had originally budgeted. In this case, consider scheduling a call with the finalists to discuss each party's budget assumptions and the tradeoffs associated with bringing their costs and your expectations in agreement. Several approaches can help resolve the issue:
 - ▶ Reduce the scope of the evaluation (e.g., fewer participants, fewer site visits, reduced communication efforts).
 - ▶ Ask the evaluator to delegate additional work to more cost-effective staff (including graduate students) with strong senior supervision.
 - ▶ Find additional funds for your evaluation or ask the evaluator to donate some of their services (in-kind services).

A good evaluator ...

- ... is willing to work collaboratively to develop an evaluation plan that meets your needs
- ... can communicate in simple, practical terms
- ... has experience evaluating similar human service delivery programs
- ... has experience with statistical methods
- ... has the time available to do the evaluation
- ... has experience developing data collection forms or using standardized instruments
- ... will work with a national evaluation team (if one exists)
- ... will treat data confidentially

See [chapter 5](#) for more information on developing a budget for your evaluation.

Create a Contract

A major step in managing an evaluation is developing a contract with your outside evaluator. Your contract should consider the following elements.

How you will pay for and monitor evaluation services

Work with experts such as your procurement office or lawyer to establish payment agreements. Many contract types and payment/reimbursement models are options for hiring evaluation work. You may also

need to specify a timeline for payments, invoicing instructions, and what supporting materials are needed to document the hours/budget the evaluator is invoicing. In some contracts, payments are tied to assessments of the quality of the work provided by the evaluator. Your contract should spell out expectations for quality management and control, standards of minimum quality, and repercussions for work of lower-than-expected quality.

Who “owns” the evaluation information

You may want to specify that your organization owns data collected under the evaluation and that the evaluator must request your permission to share the data or findings from the data. Your contract should require the evaluator to receive clearance for any plans to publish evaluation results.

Maintaining an evaluation firewall

In some evaluations, it will be important to develop and maintain a firewall, or clear separation of activities and knowledge, between the evaluator and program staff. For example, some program developers are involved in evaluations of their own programs. It is important to determine when and how the program developer has input or influence on the evaluation. For example, they may be involved in outcome measurement selection, but be firewalled from analysis activities to not influence analysis and interpretation. You should determine where your evaluation firewalls are, and make sure all individuals engaged understand the firewall, why those firewalls are in place, and what happens if they are not respected.

The contract should also address the need to align with any publication restrictions from the funding agency. In some instances, the funding agency may have requirements about the use of data and the release of reports.

You should also confirm who owns data when your evaluation uses any software or program to collect or analyze data, such as an online survey platform.

Who will perform each evaluation task

The contract should identify those who will perform each evaluation task and the level of contact between the evaluator and the program. In most cases, program staff will need to support the evaluator in some tasks; for example, obtaining consent for program participants to conduct data collection or follow-up phone calls.

If a problem occurs even after specification of tasks, you may want to speak with your evaluator to offer the option of renegotiating their level of effort or tasks. The resolution should be mutually agreeable to both program staff and the evaluator to avoid compromising the integrity of the evaluation. Again, the responsibilities of program staff and the evaluator may vary, depending on the structure of your evaluation and the amount of money available.

Expectations about evaluator and program staff contact and communications

At a minimum, an outside evaluator needs to keep program staff informed about the status of the evaluation and/or uphold agreements related to engagement, including engagement of program staff. Ideally, your evaluator will work with your larger evaluation team as a unit to ensure staff buy-in and representation of different perspectives on the program and evaluation (including community members).

Depending on the structure of the evaluation, the evaluator may also be able to provide information to the program in real time to inform ongoing program improvement efforts. Accordingly, the contract can specify the frequency of evaluation team meetings, the purpose of the larger evaluation team, and evaluator reporting requirements.

Collaborate With an External Evaluator

After you have selected an evaluator, build rapport, relationships, and a partnership. You and your staff should participate as full partners with external evaluators throughout the evaluation process as members of the evaluation team. A strong collaborative relationship will reap benefits for both parties. For example, you and your staff will learn more about evaluation and better ensure the evaluation addresses your program improvement information needs. Your engagement with the evaluation also means the evaluator will have a clearer sense of how the program functions and will be better positioned to provide more relevant and useful feedback.

As with any partnership or relationship, working with an evaluator is a learning process for both parties. Even with a solid contract in place, problems can arise during an evaluation. Mutual respect and clear communication can go a long way in identifying and resolving challenges before they become problems. You may want to discuss common problems as a team preemptively. Examples of problems you may encounter and potential remedial steps follow.

Evaluation approaches differ (the program staff and evaluator do not see eye-to-eye)

Expect some communication challenges when two different sets of expertise collaborate. Developing a shared vocabulary is a good first step. This helps ensure all parties understand what the others mean when they use terms such as participant, data collection instrument, or comparison condition. Next, try to clarify each party's main concerns, goals, and constraints. Often, issues arise when idealistic evaluation goals meet practical challenges in real-world implementation, such as what evaluation questions can be answered without a comparison group, how many people can be interviewed with a certain budget, or why a certain measure is not appropriate to ask of program participants. The goal is to reach common ground where both programmatic and evaluation constraints and needs are met.

If many reasonable attempts are made to resolve differences and significant conflicts persist that jeopardize the program or evaluation, program staff should consider terminating the contract. This decision should be weighed carefully because a new evaluator will need to be recruited and brought up to speed midstream. In some situations, finding a new evaluator may indeed be the best option. Prior to making this decision, however, talk to your program funders, particularly if they are providing financial support for the evaluation.

Make sure you follow proper procurement procedures

Check with your human resources or legal offices to ensure you are adhering to organizational regulations and legal requirements when hiring or contracting with an external evaluator. Engage these offices at step 1, when developing a job description. For example, Native American communities may need the Tribal council to approve the evaluator selection. Finally, if you are a federal grant recipient, check your grant requirements or consult with your funding agency to determine whether you need federal approval of your evaluator.

Evaluation of the program requires technical skills outside your original plan

Despite best intentions, you may find the evaluation requires additional technical skills your current evaluation team does not have. For example, you may have an evaluation design that requires a complicated statistical approach for data analysis. If this is the case, your evaluator will likely agree with your assessment or may even be the one who identifies the issue. Many federal grant programs provide evaluation technical assistance and may be able to augment that skill set. Other funders may be willing to connect your evaluation team to other experts. Alternatively, your evaluator may be able to hire an expert as a consultant or staff member to provide the additional support. Programmers, statisticians, and others can augment the evaluation team without fundamentally changing the evaluation team's structure.

The evaluator leaves, terminates the contract, or does not meet contractual requirements

Rarely, an evaluator may need to exit an evaluation. This can happen because of unexpected personal circumstances or unanticipated organizational changes. You can reduce the chances your evaluation will face serious disruption by contracting with a team of evaluators (e.g., a university research center, two evaluators working together) or a firm rather than a single individual. You can also be more prepared for a transition or disruption by maintaining close management of your evaluation. Maintain copies of all study materials; contact information for the IRB and data collection web portal; and if applicable, contact information for your evaluator's supervisor, such as the university department chair.

In other cases, you may determine the evaluator is not meeting contractual obligations. In that case, you may get support from your funder (to help mediate the discussion) or from another staff member at the evaluator's organization (e.g., their supervisor). If you ultimately decide the relationship cannot continue and you choose to terminate the contract, it is important to determine who has the rights to any materials developed and request copies of datasets, documents, and guides as a condition of the termination. When your evaluator does not meet contractual requirements and efforts to resolve the dispute have failed, public agencies should turn the case over to their procurement office, and private agencies should seek legal counsel.

The evaluator is not culturally competent or does not have experience working with your community and the participants

It is not always possible to locate an evaluator with experience in the type of evaluation you need plus experience working with specific groups and subgroups in the community. That lack of familiarity may negatively affect the quality and relevance of your evaluation. Depending on your program and service population, your evaluator may need to better understand the racial and ethnic backgrounds of your participants and their cultures, religions, languages, gender identities, sexual orientations, disability status, and other lived experiences. Evaluators can help mitigate their lack of lived or technical experience through education, participant observation in community events, interviews with community members, or hiring community representatives to become part of their evaluation staff. You can also deepen community representatives' participation in the evaluation.

You are not happy with the evaluator's findings

Sometimes program managers and staff discover the evaluator's findings are not consistent with their impressions of the program's effectiveness. Program staff may perceive participants are demonstrating the expected changes in behavior, knowledge, or attitudes, but the evaluation results do not match this perspective. In this situation, you may want to work with your evaluator to ensure the instruments being used are designed to measure the changes you previously observed in program participants.

Your evaluator will continue to need input from program staff in interpreting evaluation findings. You may also want your evaluator to assess whether some of the participants are changing and whether participants share any common characteristics that are or are not showing change over time. However, be prepared to accept findings that do not support your initial perceptions. Not every program will work the way it was intended to, and you may need to make some program changes based on your findings. Remember, findings that indicate your program is not operating as intended or not having the impact intended can be positive information you can use to refine your program. Your ultimate goal is to help participants, and if you identify barriers or challenges that impede your goal, you can develop a plan to address them and better serve program participants.

Virtual and hybrid evaluations

In response to the COVID-19 pandemic, many organizations have begun conducting evaluations on virtual platforms. This has led to new benefits, such as working with evaluators located far from a program site and the additional flexibility to host and attend virtual meetings. At the same time, virtual evaluations present logistical challenges, such as obtaining consent from participants, managing confidential data collection, and building rapport in an online environment. Future evaluation efforts will likely employ a hybrid model, using virtual activities where they make logistical and financial sense and meeting in person when necessary.

Practice Culturally Responsive and Equitable Evaluation When Engaging an Evaluation Team

As discussed in the section [Decide Whom to Engage in Your Evaluation](#), involving community members using a participatory evaluation approach can strengthen your evaluation. Community members bring their lived experience and participant understanding of your program to ensure an evaluation is more relevant, accurate, and credible. At the same time, it is important to acknowledge the complex power dynamics within evaluations, where evaluators and funders are often seen as experts and decision-makers, while program staff and community members might feel less power, authority, and agency. CREE practices can help engage community members respectfully and authentically in evaluation efforts. Consider the following recommendations:

- Identify individuals and groups who reflect your program's audience and invite them to participate in the evaluation process as advisors.

- Emphasize the importance of having evaluators who have worked with your program's service population in the job description or RFP.
- Understand the evaluation team's social identities and lived experiences. Seek consultants or hire additional staff as needed to ensure a variety of voices and experiences contribute to your work.
- Develop evaluators' awareness of how and why to engage community members in authentic ways. This could include training on CREE, participatory evaluation, and collaborative evaluation methods and benefits.
- Account for time to facilitate rapport and trust building with community representatives and ensure their meaningful contribution to the evaluation.

Assembling an evaluation team to promote inclusivity, cultural sensitivity, and empowerment

The Children Services Council of Broward County (Florida) recently presented their approach to engaging community members in data projects at the annual OPRE Methods Meeting (DuCille et al., 2021). To build a team of researchers, child welfare system professionals, and system-involved parents and youth, Broward County made use of relationships professionals already had with families. By inviting families with connections to the professionals on the research team, the team started with some foundation of trust and familiarity. The researchers then built rapport with youth and caregivers through shared meals and validating families' experiences and stories. The whole team began their work with a two-day training on antiracism, implicit bias, and local, race-related history. Finally, the researchers were prepared to provide healing responses to traumas as they surfaced, such as breathing, body movement, and one-on-one discussions.

To learn more ...

- [An Introduction to Collaborative, Participatory, and Empowerment Evaluation Approaches](#) (Fetterman et al., 2018)
- [Checklist for Building Organizational Capacity](#) (Volkov et al., 2007)
- [Empowerment Evaluation Principles in Practice](#) (Fetterman, 2005)
- [Five Steps for Selecting an Evaluator](#) (Bronte-Tinkew et al., 2007)
- [Guidelines for Working With Third-Party Evaluators](#) (Heinemeier et al., 2014)
- [Identifying and Determining Involvement of Stakeholders](#) (CDC, n.d.)
- [When and How to Use External Evaluators](#) (Rutnik et al., 2002)

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