



Evaluation Café: Closing the Deal

By

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September 29, 2005



Closing the Deal

Tips for Working Effectively With
Evaluation Clients



Interests of the Client

- ◆ Satisfaction of requirement
- ◆ Feedback for improvement
- ◆ External perspective
- ◆ Public statement of success and accomplishment
- ◆ Credibility of the effort
- ◆ Accountability in use of resources
- ◆ Basis for future decisions related to institutionalization or sustainability



Interests of the Potential Evaluator

- ◆ Contract or grant (\$\$\$\$)
- ◆ Field test or development of methodology
- ◆ Support for staff or students
- ◆ Increase visibility of organization
- ◆ Publications
- ◆ Opportunities for training
- ◆ Political influence



Red Flags or Issues of Concern for Clients

- ◆ Overall cost
- ◆ Daily rates of pay for staff/consultant fees for specialists or advisory groups
- ◆ Time required of local personnel
- ◆ Ownership of data and reports/interests of evaluator to develop publications from effort
- ◆ Confidentiality
- ◆ Demands for secure information
- ◆ Disruption of routines
- ◆ Use of graduate students or college professors
- ◆ Use of personnel who may not “understand us”



Red Flags or Issues of Concern for Potential Evaluator

- ◆ Client demands final review (and approval) of all plans, instruments, and reports
- ◆ Refusal to provide clearance for acquisition of essential information
- ◆ Unusual concerns about observing all aspects of the project
- ◆ Confusion about who is in charge of the project
- ◆ Sources and procedures for payment
- ◆ Inclusion of legalize in contracts and agreements



Positive Signs from Client

- ◆ Interest in local evaluation capacity building
- ◆ Plans to widely distribute reports
- ◆ Offers or opportunities to meet local staff and visit project sites
- ◆ Inclusion of key personnel in initial or early planning meetings between client and evaluator
- ◆ Recognition of appropriate roles of involved parties
- ◆ Willingness to meet regularly and/or review draft reports for accuracy
- ◆ Interest of client to be a partner as opposed to an approval body



Near Essential Elements to Close the Deal

- ◆ Benefits justify the costs
- ◆ Satisfaction with experience and interests of the lead evaluator and his/her staff
- ◆ Proposed evaluation plan reflects and includes the interests of the client
- ◆ Willingness of the evaluator to be flexible as unexpected situations arise
- ◆ Evidence that deadlines will be met
- ◆ Evaluation staff understands the culture and will relate in a positive manner with local personnel
- ◆ Minimal disruptions of local routines
- ◆ Mutual trust