

Specify responsibilities of the evaluation manager and the evaluator(s)

Evaluation managers are often, but not always, the project / program manager, the head of programming in the organization, or the manager or other staff from the evaluation unit (or the dedicated M&E officer in the organization).

The evaluation manager is responsible for:

- ensuring that the evaluation runs according to plan (see [Step 6](#)) and meets the milestones or deliverables on time
- problem-solving where needed (or direct issues to the relevant individual / entity to address)
- ensuring evaluators have access to all relevant project / program documents and stakeholders involved in the project / program and/or the evaluation (see [Step 7](#))

In a large evaluation, the evaluation manager may be assisted by one or more other staff members who will be assigned specific responsibilities in the management process.

Basic management skills also apply to managing an evaluation in terms of personnel management and logistics. Where evaluation management differs is in the content: the evaluation manager needs to have a basic understanding of evaluation methods and processes to assist the evaluation team with making the best possible choices.

It is crucial to the success of the evaluation that the evaluation manager:

- is formally identified;
- has a clear understanding of the scope of her/his authority (i.e., knows what she/he can decide herself/himself related to the running of the evaluation and what she/he needs to get clearance for and from whom);
- can access relevant information and staff (of the organization commissioning the evaluation and of the intervention implementers).

In addition, a clear understanding of the roles of all those involved in the evaluation is essential including the evaluator(s).

Products

The following items are potential outputs from this step. Where possible, it might be useful to research other deliverables that have also been shown to be effective.

List of responsibilities of the **evaluation manager** which may include:

- Educate the external evaluator(s) about: the program's objectives, operations and intended beneficiaries; the expectations about the evaluation and any relevant organizational background.
- Provide input and/or collate feedback on the evaluation plan.
- Specify the reporting requirements in terms of progress in the implementation of the evaluation (including reporting of important challenges and their resolution or which potential issues need to be raised for decision making elsewhere)
- Specify what is expected to be included in the formal evaluation report(s).
- Keep the evaluator(s) apprised of any changes in the program's operations or evaluation context.

- Provide regular updates on the evaluation process to all staff.
- Monitor the implementation of the evaluation including completion of milestones/deliverables.
- Facilitate program staff involvement in the evaluation, where relevant and agreed.
- Serve as the trouble-shooter, resolving problems or locating help to resolve them.

Adapted from: The Program Manager's Guide to Evaluation. Second Edition. Washington DC: Office of Planning, Research and Evaluation. Administration for Children and Families, US Department of Health and Human Services, 2010; p.28

List of responsibilities of the **evaluator** which may include:

- Develop an evaluation plan, in conjunction with the evaluation manager and program staff.
- Provide monthly or quarterly progress reports on the implementation of the evaluation (written or in person).
- Attend program staff meetings, evaluation advisory board or coordinating committee meetings.
- Train data collectors such as on:
 - Participant/case selection for sampling purposes
 - Using data collection instruments
 - Data quality assurance
- Ensure adherence to ethical standards adherence (e.g., confidentiality of data) during all phases of the evaluation.
- Implement or oversee implementation of data collection such as:
 - Interviewing program staff, program participants
 - Conducting focus groups
 - Observing service delivery activities
 - Reviewing participant case records
 - Developing data management procedures and tools (e.g., database)
 - Coding, entering, and cleaning data
 - Analyzing data
- Write interim (quarterly, biannual, yearly) evaluation reports and the final evaluation report.
- Present findings to program staff and others in the organization
- Present findings at meetings and conferences.

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