

Quality and evaluation in voluntary and community organisations

Guidance paper 2

What to include in an evaluation brief

Commissioning an evaluation: what to include in an evaluation

When commissioning an evaluation, it is helpful to write an evaluation brief. This is a short document – perhaps two to four sides of A4 – outlining what the consultants need to know. This can then be sent to any consultants being asked to tender for the work.

Writing an evaluation brief means that the proposal you get from a consultant is more likely to have all the information you need to be able to make a decision. It also helps the consultants to tailor the work to your needs.

This paper provides guidance on what you might cover in an evaluation brief. However, consider also talking your brief through with an evaluator to help you get it right.

Before writing the brief

Before writing the brief you should think through the following points:

- Who will do the work? Do you want all the work done externally, or will some be done internally?
- Who will liaise with the consultant? Make sure you have one named person who will take responsibility for the work, and who will be the contact point for the consultant. When choosing this person, try to ensure that they will be available for the whole period of the evaluation.
- Will you want the consultant to work with a steering group or an advisory group? These can be very helpful for large projects.
- Will there be regular meetings between a representative from your project and the consultant? These could be face-to-face, or sometimes over the phone or by email.
- If there will be administration involved in the work (eg, sending out a questionnaire) can you offer to do some of this internally to keep the costs down?

Content of the brief

Your brief may include details on the following:

The commissioning organisation

Make it clear who is commissioning the evaluation. Is it the organisation being evaluated or another agency, usually a funder?

Brief details about the organisation being evaluated

Give a basic outline of the organisation. For example, outline the basic services, numbers of staff, numbers of users and 'turnover' of users. If the evaluation is of a project within the organisation, please do the same for the project. Include as supporting materials any appropriate documents, for example, business plans or marketing leaflets and website address.

The evaluation: purpose; focus; use and audience

- What is the focus of the work? For example, will it focus on the whole organisation or just part of the service? Is there any part of the service that will be excluded?
- What is the purpose of the evaluation? Is it to help strategic planning, or to obtain more funding, for example?
- What do you want to find out? What are your evaluation questions? For example, you may want to find out what the outcomes are for your users.
- How will the evaluation be used? For example, is it to help you develop and improve the service, or to demonstrate accountability to funders, or both?
- Who will read and use the evaluation report? It is important that the report and its methods are tailored to the needs of the evaluation users.

Issues affecting the evaluation

- Do you want the evaluation to reflect particular organisational values? For example, you may want the evaluators to take a participatory approach to work with users, by consulting them about the evaluation.
- Has any evaluation of this work happened recently? When? What worked well about this, and what could have been improved?

Data collection

- What monitoring data already exists? Are there any existing monitoring data or previous reports that can be drawn on? How is monitoring data stored? Has the data been summarised or analysed already?
- Are there any other sources of information? There may be previous evaluation reports, or other paperwork the consultant will need to read.
- Very broadly, how do you expect data to be collected? Remember that a researcher will need flexibility to suggest what they think most appropriate as well.
- Who are the key stakeholders the consultant should speak to?
- Are there any constraints on data collection that the researcher should be aware of? For example, will there be difficulties with contacting/communicating with users?

Internal responsibilities and liaison

- Who will liaise with the consultant?
- What work will be carried out internally, for example, collecting data and putting it together, or administration work?
- What liaison meetings, or advisory or steering group meetings will there be?

Reporting

- It is important to be clear about what you expect the consultant to produce, eg, a report with recommendations or a presentation. You might wish to clarify who will own the work and have copyright.

Practicalities

- Ask the consultant to specify who will be involved in the work, and for an indication of what each team member will be doing.
- Get CVs, examples of work and perhaps follow up references of consultants before agreeing to work with them.
- You may require the consultant to have public liability and professional indemnity insurance.

Timing of the work

- When would you like the work carried out and completed? Many consultants need a lot of notice, especially if it is a large piece of work. Try to give them at least three months notice; longer is better.
- Is there any flexibility in timing?
- If you want a written report, outline when you would like to receive it, and whether you will be able to comment on drafts.

Budget

- Make it clear whether you already have funding for this work, or whether you are waiting to hear about funding for it.
- Specify your budget for the evaluation.
- Remember to make clear if the budget includes VAT – this can make a difference.

Timescale for considering evaluation proposals

- When do proposals need to be sent to you by?
- Include planned interview dates in the brief to increase the chance that the consultants will be available.
- Give contact details of someone who can discuss the project with consultants to help them draw up their proposal of work.

Telling consultants about other important information

There is other information that you may not wish to include in your brief, but you should discuss with potential evaluators before you agree a contract. For example:

- Is there anything else about the organisation that may affect the work? For example, have staff had a previous negative experience of evaluation, or is future funding uncertain and staff are worried about this? Consultants can plan their work better if they know about such difficulties in advance.
- Are there any IT compatibility issues, eg, versions of Word or issues concerning access to paper files?
- Are there any issues concerning confidentiality for staff and users?

Think through any other issues that may affect how the evaluation is carried out.

What services does CES offer?

In-house training

CES offers training in monitoring, evaluation and quality systems. Training courses can be run in-house and tailored specifically to the needs of your organisation.

Open training

We also run a programme of training courses covering monitoring and evaluation and quality systems from our accessible central London venue.

Contact us by email: training@ces-vol.org.uk or call for our training guide.

Consultancy

Our consultancy service is flexible and provides support for organisations that want to understand and implement monitoring, evaluation and quality systems.

External evaluations

CES has carried out evaluations of a large number of organisations since 1990 as well as working with funders to evaluate their programmes and funding strategies.

Contact us on enquiries@ces-vol.org.uk or call for more details.

Publications

CES produces a range of publications on quality and evaluation. Please look at our website www.ces-vol.org.uk for further details.

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