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