Your RFP for evaluation services is terrible. **You can fix it.**

Be explicit. Be clear. Get the services you need.

Successful evaluation RFPs include:

- ✓ SCOPE
- ✓ PROGRAM MODEL & GOALS
- ✓ CURRENT DATA COLLECTION ACTIVITIES
- ✓ THE EVALUATION YOU SEEK
- ✓ LOGISTICS OF THE EVALUATION
- ✓ LOGISTICS OF THE RFP

It doesn't have to be this way!

Requests for Proposals for evaluation services are usually terrible. They read like Mad Libs of contract language and evaluation jargon, and almost never provide evaluators seeking to prepare a good proposal with all the information they need to respond.

[public profit]

Bad evaluation RFPs lead to three even worse things:

1) Well-qualified firms decide not to compete, because the level of effort required to respond is too great.
2) Submitted evaluation proposals miss the mark, frustrating reviewers.
3) Faced with a mountain of not-very-great evaluation proposals, organizations decide that it's not worth it to work with evaluators. Or, even worse, no one responds to the RFP, leaving the requestor high and dry.

Fortunately, most program evaluations RFPs can be successful with just a few(ish) pieces of information. Even better, this information is usually available in organizations' grant proposals, program reports and prior program evaluations. You have what you need already!

Use this guide to prepare an evaluation services RFP that will yield stronger, more useful proposals. And if you find you can't answer the questions in the guide, consider issuing an RFP for evaluation planning, instead.

1. SCOPE OF SERVICE

In this section, describe your services as completely as you can. It's A-OK to reference other documents or web sites if this is written elsewhere.

Information about the scope of program services helps evaluators to more accurately estimate their level of effort, leading to fewer contract amendments down the road.

Key Questions

- ☐ What kinds of services will be evaluated?
- ☐ How many sites/programs will be included in the evaluation?
- ☐ How many participants overall? Per site? (Estimates are OK!)

2. PROGRAM MODELS & GOALS

In this section, describe how your services are meant to affect its clients or community. This is also a good place to list any programmatic goals. Usually your grants require them.

Gather the documents listed in the checklist to the right. If you do not have these documents, ask your evaluator to help you in developing them.

Sharing this information at the outset will assure that the evaluation reflects the program design and outcome goals.

Key Questions

- ☐ Are there specific outcome measures required by your grants? If the evaluation will collect data to address them, list them in the RFP.

Documents to Share

- ☐ Theory of Action
- ☐ Theory of Change
- ☐ Logic Model
- ☐ Program description of any kind that links, in a coherent way, your programmatic activities and intended outcomes

3. CURRENT DATA COLLECTION ACTIVITIES

In this section, describe what information is already being collected. If you want the evaluator to collect some (or all!) of the data about the program, say so. If you want the evaluator to complement existing data with new information, say so. Data collection is the most costly part of an evaluation, so make the most of data you already have. And if you don't currently collect data about your program, say so.

Data Collection Activities

What data is currently collected about the program and its participants?

- [ ] Enrollment?
- [ ] Client demographics?
- [ ] Participation?
- [ ] Observations? (Of what? How often?)
- [ ] Surveys? (Of whom? In what languages? How often?)
- [ ] Assessments?

Collection Process/Formats

In what ways are they collected?

- [ ] Hard copy or electronic?
- [ ] Homegrown or validated?
- [ ] Who collects this data? How are they trained?
- [ ] When is data due?
- [ ] Who monitors the data quality? What happens if the quality of the data is terrible?

Key Questions

And some nitty-gritty questions that enable evaluators to link data together and adhere to human subjects protection laws:

- [ ] Does your program use a unique client identifier? With which data?
- [ ] How does your organization collect client (or parent) permissions for collection and use of data? What method does your organization use to track these permissions?
- [ ] If your organization wants to use external data (e.g. from health departments, police, or school districts), are data sharing agreements in place? Will the evaluator help to procure these?

Use the checklist on the next page to map out your data sources by type.

CURRENT DATA COLLECTION ACTIVITIES | Program Data Checklist

Describe the Data	Format	Validity	Data Collection	Data Quality
ENROLLMENT:	☐ Paper ☐ Electronic	☐ Homegrown ☐ Validated tool	Collected by: Collection Dates:	How is data quality assured?
DEMOGRAPHICS:	☐ Paper ☐ Electronic	☐ Homegrown ☐ Validated tool	Collected by: Collection Dates:	How is data quality assured?
PARTICIPATION:	☐ Paper ☐ Electronic	☐ Homegrown ☐ Validated tool	Collected by: Collection Dates:	How is data quality assured?
OBSERVATIONS:	☐ Paper ☐ Electronic	☐ Homegrown ☐ Validated tool	Collected by: Collection Dates:	How is data quality assured?
SURVEYS – PARTICIPANTS:	☐ Paper ☐ Electronic	☐ Homegrown ☐ Validated tool	Collected by: Collection Dates:	How is data quality assured?
SURVEYS – STAFF:	☐ Paper ☐ Electronic	☐ Homegrown ☐ Validated tool	Collected by: Collection Dates:	How is data quality assured?
SURVEYS – OTHER:	☐ Paper ☐ Electronic	☐ Homegrown ☐ Validated tool	Collected by: Collection Dates:	How is data quality assured?
ASSESSMENTS, COLLECTED BY PROGRAM:	☐ Paper ☐ Electronic	☐ Homegrown ☐ Validated tool	Collected by: Collection Dates:	How is data quality assured?
ASSESSMENTS, FROM ANOTHER SOURCE:	☐ Paper ☐ Electronic	☐ Homegrown ☐ Validated tool	Collected by: Collection Dates:	How is data quality assured?

4. THE EVALUATION YOU SEEK

Finally! In this section, describe what you want the evaluation to accomplish. If there are examples of evaluations that you really like, consider linking to them in the RFP.

Guiding Questions:
Putting Together the Pieces of Your Evaluation RFP

Purpose of the Evaluation

Do you want the evaluation to…

- ☐ Inform practice as you go? (e.g. process or formative evaluation)
- ☐ Summarize accomplishments once the initiative is complete? (e.g. summative or impact evaluation)

Evaluation Questions

- ☐ What are 3-4 "big questions" that the evaluation should address?
- ☐ Will the evaluation begin at about the same time the program does? If not, what are your expectations for the evaluator to collect retrospective data?
- ☐ How rigorous does the "proof" need to be?
    - o Do you need a control or comparison group?
    - o Are you OK looking at the people in our program only?
    - o Do you want an evaluator's advice on this?

Deliverables

- ☐ What do you want reports to cover? How often do you want them?
- ☐ Do you want site- or program-level data summaries?
- ☐ Do you want spreadsheets of data for other uses?
- ☐ Do you want in-person presentations? How many?

Budget

- ☐ What will you spend on evaluation services?

  A budget indicates the level of effort the client expects of the evaluation team. When proposals have similar budgets, you can compare the proposed level of service more accurately.

If you don't provide a budget estimate, you'll receive far fewer proposals.

5. EVALUATION LOGISTICS

The start-up phase of an evaluation may require more time from someone on your team to work with the evaluator. In this section, identify the point of contact and whether there are regular meetings available for communication between your team and the evaluator. This enables evaluators to make realistic timelines and to include information on how regular updates will be shared.

Key Questions

- ☐ Who will be the point of contact for the evaluation? Do they want an estimate of how much of their time will be needed for this?
- ☐ Are there regular staff meetings where evaluation can be discussed? Where staff can be trained?

6. RFP LOGISTICS

Most organizations have well-vetted processes in place for RFP logistics. But just in case…

Do you have restrictions on page length? Some RFPs ask respondents to address 15+ meaty questions in 10 pages. That's silly.

Hold a bidders' conference. Broadcast it online, or through a conference call. The bidders' conference should include a staff member knowledgeable about contracting details AND a staff member knowledgeable about the program and desired evaluation services.

Publish the list of attendees at the bidders' conference. Evaluation firms know each other and like to collaborate. A team-based approach may benefit everyone.

Accept questions via bidders' conference and email; post them for all to read. If a rubric will be used to review proposals, include it in the RFP.

Does your organization have additional assurances or forms that bidders must complete as part of the proposal process? Are their mandatory contract documents that should be in the RFP? Share them.

Getting the Word Out

Consider posting to the American Evaluation Association, any other relevant professional associations (e.g. American Educational Research Association) and including a note in your organizational newsletter. Asking colleagues about the evaluators they know is a good idea, too.

About Timing…

Nothing says, "We already know who we want" than a 2-week proposal turnaround.

Allow at least a month between RFP release and due date, longer if major holidays fall within the timeline.

Depending on your review process, leave a month between the proposal due date and the announcement of the winning firm. Ideally, leave *another* month (or two!) between the announcement of the winning firm and the start of the project. Many of the best evaluators are booked months in advance, and will need some time to prepare for your project.

And if you really love this topic, here are some additional resources:

An Open Letter to All Organizations in Need of a Program Evaluator
https://etwus.wordpress.com/2011/03/08/an-open-letter-to-all-organizations-in-need-of-a-program-evaluator/

10 things you should know about creating an effective RFP
http://www.techrepublic.com/blog/10-things/10-things-you-should-know-about-creating-an-effective-rfp/

Top 10 Tips for Writing a Great RFP
http://www.spectrumscience.com/public-affairs/top-10-tips-for-writing-a-great-rfp/#sthash.9dEpCaib.dpbs

RFP Builder
http://rfp.prfirms.org/00_overview.aspx

public profit

We hope this guide is helpful for you!

Please send any questions or suggestions to us at info@publicprofit.net