

CLARIFYING THE INTERNAL/EXTERNAL EVALUATOR RELATIONSHIP

This document lists various roles and tasks that evaluators perform. While there is no requirement to have an internal evaluator, this document offers a starting point for designating tasks in agencies that have qualified internal evaluators (health educators, epidemiologists, etc.)

Items in bold should be considered priority for external evaluators. Where a function can be performed by internal or external evaluators, projects can choose which evaluator with which to designate the role, or if it should be shared.

This is for illustrative purposes only. This is not a template or a requirement.

ROLES, RESPONSIBILITIES, & TASKS

Internal

External

Evaluation Plan Development

Defining the goals and methods of the evaluation (e.g., end-use strategizing, outcome and/or process and evaluation activities)

X

X

Evaluation plan revision for 2017-2021 SOW & CTCP negotiations meetings

X

X

Evaluation plan development for 2021-2025 SOW & plan certification & CTCP negotiations meetings

X

X

Evaluation Planning, Scheduling & Monitoring Meetings

Evaluation planning/coordination (Gantt-chart type planning) & **semi-annual review meetings** (designed to document information for final evaluation reporting)

X

X

Evaluation plan implementation & monitoring meetings (monthly, or as needed)

X

X

Document and archive activity outcomes (e.g., target audience, approaches, audience reaction and comments, actions taken as a result, etc., as well as how results were shared with key stakeholders)

X

ROLES, RESPONSIBILITIES, & TASKS

Internal

External

Pre-Data Collection

Data collection logistics planning	X	X
Developing data collection instruments & protocols, determining sampling specifics and data collection parameters		X
Instrument pilot testing & field testing, if necessary	X	X
Approving data collection instruments & protocols, sampling specifics and data collection parameters	X	
Conduct data collection trainings and/or provide technical assistance on data collection and data entry	X	X
Database design or online survey set up for data collection using online/handheld/mobile devices or entry by staff data collectors	X	X

Data Collection and Analysis

Collecting data and information (primary data)	X	X
Processing and preparing data for analysis	X	X
Data cleaning	X	X
Data analyses	X	X

Reporting and Sharing Findings

Interpreting results and formulating recommendations		X
Participatory data analysis with project staff to understand how data informs project activities	X	X
Writing evaluation activity summary reports for the project and for inclusion in progress reports	X	X
Identifying appropriate audiences for the findings	X	X
Preparing data visualizations, Highlights or Executive Summaries for sharing results throughout the project in community presentations, fact sheets, educational packages, reports (1)	X	X
Populating the Online Tobacco Information System (OTIS) with evaluation-related Information semi-annually	X	X

(1) Graphic design services, if necessary, can also be built into the project's budget.

ROLES, RESPONSIBILITIES, & TASKS

Internal

External

Statewide Meetings/Trainings

Participating in 2 In-person statewide meetings/regional trainings per year (2)	X	X
Participating in 2-3 Online Statewide Trainings per year	X	X
Participating in 2-3 Communities of Practice meetings (TEA/The Evaluator Alliance) per year	X	X

Final Evaluation Report Development (2017-2021)

Preparing Brief Evaluation Reports for non-primary objectives with Internal Evaluator support		X
Preparing Brief Evaluation Reports (Interim Report) for primary objectives targeting multiple jurisdictions with External Evaluator support	X	X
Preparing Final Evaluation Report for primary objective with Internal Evaluator support		X

Other possibilities, time permitting:

Stakeholder Activities

Educating project directors and partners informally	X	X
Formally presenting data in meetings/forums	X	X
Collecting data (secondary data) for CX Needs Assessment	X	X
Planning and facilitating CX Meetings	X	X
Facilitating general strategic planning or Midwest Academy Strategy (MASC) planning with coalition	X	X
Reporting on CX Needs Assessment by indicator/asset in OTIS	X	X

(2) Travel expenses will have to be factored into the project budget. For external evaluators with multiple contracts, the travel expenses for statewide or regional events could be shared among projects.