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Evaluation Expectation Setting Tool

General Expectations

Questions to ask yourself	My Expectations/Goals
How and how often will I communicate with my evaluator? Who will be the evaluator's point person?	
How much background and context of the project and organization will I share with my evaluator?	
How and when should I engage a potential evaluator in proposal development?	
What can I afford to budget for an evaluator? What will that budget enable?	
How and how often do I want to receive formative feedback?	
How and how often do I want my evaluator to provide summative feedback?	
How will I deal with conflict with my evaluator?	
How will I deal with changes to the scope of work?	
What types of data collection do I want to see happen? Who will be responsible for each piece of data collection? What are my expectations for accessing the raw data (vs. aggregated data)?	
What reporting formats would most support me in my reporting to funders and in decision-making?	
Do I want my evaluator to help with my dissemination? Can my evaluator publish using my evaluation results? Can they share them on their website?	

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Diversity, Equity, Inclusion (DEI)-specific Expectations

Questions to ask yourself	My Expectations/Goals
Is my project DEI-specific? If not, am I interested in DEI-specific feedback from my evaluator?	
What types of DEI blindspots do I want my evaluator to advise me on?	
How can my evaluator help hold me accountable to my DEI values and goals?	
How important is it to me to have results disaggregated by identity groups?	
How can I model inclusivity in my project and in how I work with my evaluator?	
What is my ideal way to receive feedback and how will I listen to feedback?	
To what extent am I willing to reflect on my program and processes? What will be my process for self-reflection?	
What can I do to decrease power differentials with the evaluator and work as a partnership?	
How can my evaluator and I communicate about our work with transparency?	

Ask yourself:

- How do all of my answers fit (or not) with my DEI values?
- How will my project/grant align with my DEI values?
- How will I model my DEI values in my relationship with my evaluator?