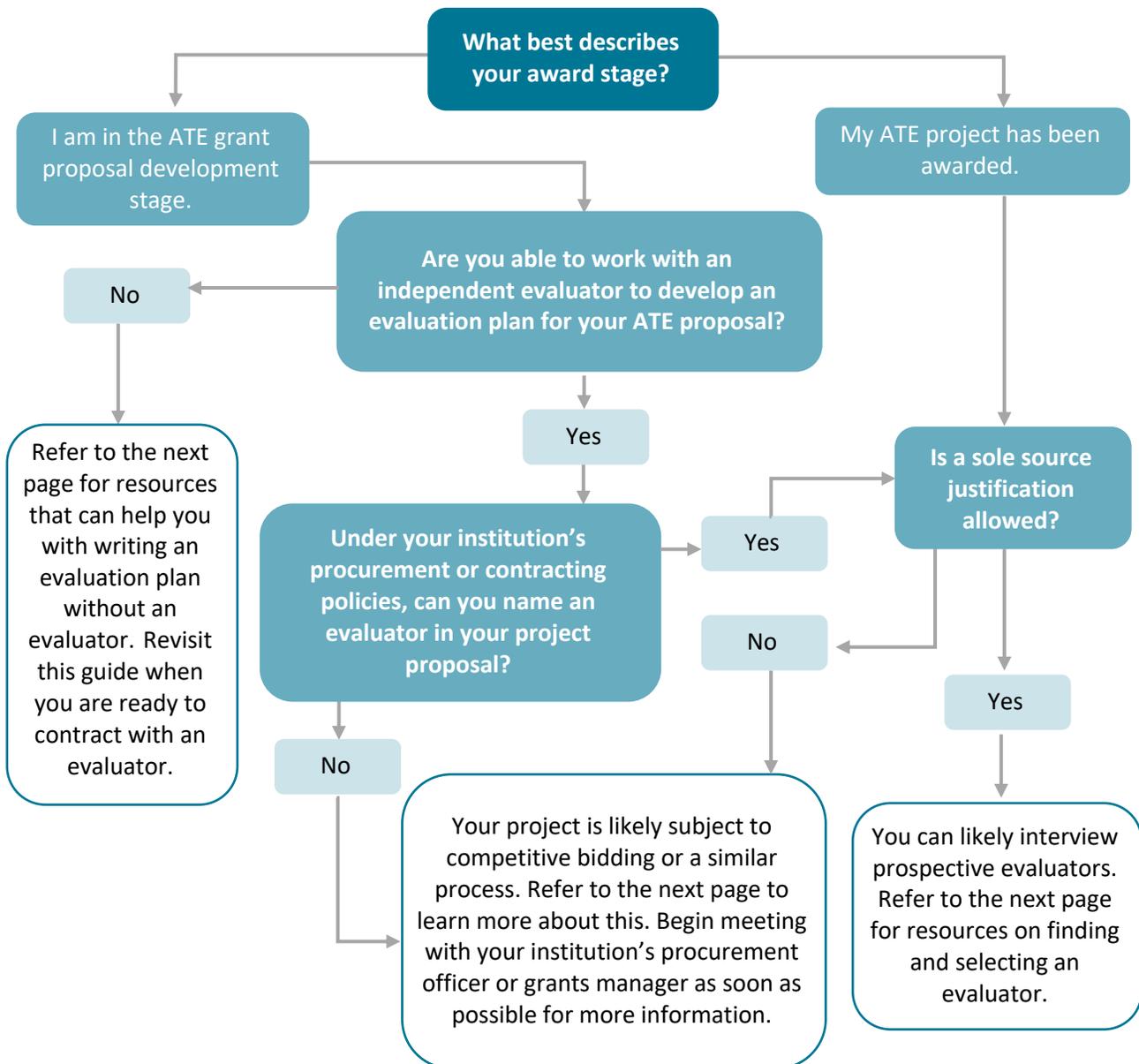


Every NSF-funded ATE project is required to include an evaluation plan in its proposal and to work with an independent evaluator. For many projects, the act of procuring independent evaluation services is subject to institutional procurement policies. This step-by-step map aims to provide prospective and new ATE grantees with a general overview of when and how to select an evaluator. This resource may be most helpful while developing an ATE proposal and/or before naming an independent evaluator.

Remember, this process varies across institutions and can take time. Therefore, we recommend meeting early on with those who can walk you through your institution’s specific process (e.g., your institution’s procurement officer, purchasing or fiscal agent, or grants manager).

Mapping Out the Evaluator Procurement Process



Key Terms

Independent evaluator	An individual or entity external to the project who is contracted to conduct an evaluation. The person may be external to your institution or, if the person has no other role in the ATE project, is qualified for the work, and has no potential conflicts regarding project personnel or outcomes, they may be internal to your institution. This is a requirement for all ATE projects, as stated in the NSF Solicitation Guidelines (bit.ly/NSFSolicitation).
Competitive bidding or contracting process	The formal process of identifying, selecting, and contracting for professional products or services by soliciting bids from prospective vendors (in this case, evaluators). Each institution specifies its own competitive bidding or contracting requirements, so if your project is subject to this process, contact your institution's procurement officer or grants management office as soon as possible to learn more.
Procurement policies	The policies that dictate the overarching principles and standards used to identify, select, and contract with professional products or services. The purpose of these policies is to ensure that purchasers receive products or services that are the best balance of price, quality, and service while minimizing fraud, waste, and abuse in purchasing. These policies exist in many institutions.
Sole source justification	A statement explaining that, to the best of the purchaser's knowledge, only one supplier is appropriately qualified and can provide the necessary products or services sought by the purchaser. This justification must describe the steps taken to research potential vendors and suppliers. Reach out to your institution's procurement officer or grants management office to learn about the circumstances under which a sole source justification is applicable.

Resources to Support Your ATE Proposal Evaluation Plan

- **Evaluation Plan Checklist:** Know what elements to include in your ATE evaluation plan (bit.ly/ATEevalplan).
- **Evaluation Plan Template:** Organize your evaluation plan (bit.ly/ATEevaltemp).
- **Logic Model Template:** Create a visual summary for your project activities and anticipated outcomes (bit.ly/logicmodeltemp).
- **Integrating Evaluation into Your ATE Proposal:** Check out this video series to learn more (bit.ly/ATEeval).
- **Evaluation Crash Course for Non-Evaluators:** If you're new to evaluation, this webinar is for you (<https://bit.ly/EvalCrashCourse>).
- **Finding and Selecting an Evaluator:** Start here if you're looking for an evaluator (bit.ly/FindEvaluators).

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