

Spring 2014

Independent Consulting TIG Newsletter

New Year and Renewed Initiative

by Stephen Maack 2014 TIG Chair



As we mourn the loss of Pete Seeger I think of his song “Turn! Turn! Turn! (To Everything There Is a Season).” I’m also reminded of Jon Pratt’s article (*The Non-Profit Quarterly*, 10(2), Summer 2003) that

helped me understand why my newly established firm’s markets were drying up after the 2002 recession. It basically said that non-profits lag going into and coming out of a recession because of how they are funded. Foundation endowments fluctuate with the stock market and shrinking endowments yield shrinking grants. Government spending lags recessions going into them and is delayed in increasing until after recessions end and tax revenues start increasing. No wonder I couldn’t find clients then -- we were in the middle of several counter-cyclical economic forces that had dried up their potential contract funds!!

As we enter 2014 I’m cautiously optimistic. The economy gradually sputters alive after the Great Recession. I live in California and have closely followed two other states since mid-2010 during a national evaluation sub-contract. I saw more state funding in those three states during their 2013 legislative sessions. Since fall 2013 I’ve been seeing more RFPs from state and local agencies, non-profits, and foundations. So

I’m ramping up my looking for new clients as my national sub-contract ends.

The IC TIG has started moving into the strategic planning effort announced at our AEA 2013 business meeting. We held our first planning meeting by conference call and decided to work toward a three-year strategic plan (2015-2017). Four brave volunteers (Deb Levy, Matt Feldmann, Don Dailey, and Gary Ciurczak) have begun researching a Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis to report out at the next meeting. They will need to think broadly about cycles and futures! Laura Keene and Francesca Wright are looking into the TIG history and recent progress. We’re enlisting the help of TIG old-timers to locate previous TIG Mission statements. The current Mission statement on the TIG website will change. I’m starting a STEP analysis looking at Social, Technological, Economic, and Political factors that may affect the TIG’s plans. Factors identified in the STEP analysis may help us think differently about our SWOT analysis and planning strategies. We’re carefully reviewing Amy Germuth’s 2013 TIG survey. Other committee members are Cindy Banyai, Shamsah Ebrahim, Rita Fierro, James Griffith, Elena Harman, Arlene Hopkins, Loretta Kelley, Randi Nelson, and Paula Pipes. Please contact us with your thoughts at consultant@reapchange.com. We welcome your insights!!

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Next newsletter deadline:

May 31, 2014

Please send questions, submissions, or suggestions to Loretta Kelley at LKelley@kpacm.org

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Meet Shamsah Ebrahim

Each quarter we will feature an IC TIG member in this newsletter. Send your suggestions for future interviewees to Loretta Kelley LKelley@kpacm.org



1. What is your disciplinary background?

My formal training is as an experimental scientist; after my doctorate I balanced out my quantitative side with social science work in education. I was fortunate to realize, just in the last decade, that the quantitative and the qualitative can be happily married in the field of evaluation. Now I'm thrilled to be part of this dynamic and thriving discipline – or as Jody Fitzpatrick would say, transdiscipline – which continues to welcome and value a multitude of perspectives.

2. How and why did you get into independent consulting?

I count myself among the throngs who fell into the field of evaluation by accident, and suddenly found myself more at home than ever before. On the other hand, I got into independent consulting completely on purpose – although I'm never one to say that that's my final answer. I love the flexibility of consulting, the changing rhythm of each project, the opportunity to work with different colleagues, and in different teams – sometimes

managing a client's staff, sometimes working with other consultant colleagues, sometimes working on my own with a set of clients who form a team of peers all learning together. The only downside so far about running my own solo practice is the limited opportunity to take on larger projects and international projects. So any of you out there, give me a call if you have ideas on how I can have it all.

3. Are you primarily qualitative, primarily quantitative, mixed methods? Which do you prefer?

I am hands-down a mixed-methods evaluator. I like to know what, but I really like to know why. And how. And in what contexts. I suppose I like to ask a lot of questions. Then I figure out which methods will help me figure out a robust answer.

4. What is your focus, or subspecialty?

I named my company Leading Edge Advisors, so that I could remain broad and flexible in the areas of Data, Strategy, and Evaluation. Sometimes I'll go

months on a project that is all data, but no real evaluation – for example, helping a school district plan and execute the transition to a new Student Information System. Sometimes I'll be focused solely on evaluation – like when I was piloting an at-the-time innovative evaluation system in Kenya, for rural teachers to evaluate their professional development in real-time with their flip phones. My favorite projects involve strategy and evaluation capacity-building, where I get to roll up my sleeves and partner with clients who are interested in going shoulder to shoulder through the engagement to think through the context, the desired outcomes, the information that is coming in from the field, and putting it all together to determine how all of that should influence the path forward.

5. What was your favorite evaluation experience?

My greatest satisfaction is leaving a project or a client knowing that they have caught a glimpse of the Evaluation Lotus; once they have seen it bloom, they will never be the same.



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Dealing with the Feast or Famine Reality in Evaluation Consulting

Taj Carson
Carson Research Consulting

There are a lot of ups and down in the consulting business, and evaluation consulting is no exception. In this article, I lay out some strategies for managing the fluctuation in business that comes with working for yourself.

Networking

A good friend of mine once said, “we’re farming, not hunting”. Constant, patient, networking, meeting people for coffee, checking in, sharing information, this is where most of our work has come from. Networking is talking to people and keeping up with them regularly, so that when an opportunity comes up, they think of you. Networking is not stalking someone when you know they have an RFP out.

Marketing

Networking is a type of one-on-one marketing, but marketing is also about knowing how to talk about you and your company. Know what your niche is. For example, Carson Research Consulting specializes in helping organizations to get more out of their data, using technology and data visualization tools. We also specialize in applied, community-based research. That’s who we are.

Low overhead = Survival

Keep your costs low. Work out of your home for as long as you can get away with it. I survived lean times because I had low overhead. I even thought about my mortgage as overhead when I bought my house, because if I can’t pay my mortgage I have to go work for someone else. And that’s not happening. When hiring, I started with a part-time research assistant. Even now, I’m very careful about hiring new full-time staff, because once we have them, we have to bring in enough to support them.

Ultimately, everyone takes risks. And going out on your own is definitely risky. So the goal is to make your risks as calculated as you can. Both feast and famine can break you. Of course, not having enough work can cause your business to fail. But having too much work can be as much of a challenge as not having enough. If you take on work you can’t do well, your reputation will suffer and you won’t get repeat business. So the goal is to balance your efforts and time your new contracts so you have a steady flow (or at least as steady as possible). Having resources set aside that you could live on for at least six months doesn’t hurt either.

Rockin’ it on Facebook!

Laura Keane
2014 Social Media Coordinator

What’s happening?

The Independent Consulting TIG is on [Facebook](#) and it’s awesome! We have 136 likes as of late-January and it’s growing all the time. Thanks to a great group of Content Creators, there’s a new post most weekdays, which helps support independent consultants in their roles as both business owners and evaluators. This includes articles from the Small Business Administration, AEA365, Forbes and Biznik, cartoons from Fresh Spectrum, links to this newsletter, plus conference information, pictures, and much, much more.

Between the Facebook page and the popular [AEA Independent Consulting TIG eGroup](#), we’ve been able to build a solid web presence, allowing members to connect and share resources in a variety of ways. The eGroup continues to be a great place to ask and answer questions and share specific resources among members. As a complement, the Facebook page offers a wider breadth of resources and provides an opportunity to reach out to potential members, showing them what our amazing community has to offer.

How did we get here?

The Independent Consulting TIG’s Facebook page was created in November 2011 by social media wizard Cindy Banyai who was



our one and only Content Creator until early 2013. When the Webmaster role expanded to a full Media Committee in 2013, we were able to add a few more people to the page and quickly saw the value of having additional content generated from different perspectives. As a result, a proposal for an expanded Media Committee was put forward at the AEA Conference last October and we were able to recruit three more Content Creators: Gail Barrington, Jessica Vallejo, and Mary Nash (yup, that’s right, Gail Barrington is a Content Creator on our Facebook page, now you really want to check it out).

What’s next?

With our new Content Creators on board, we’re looking forward to seeing how the Facebook page evolves in 2014. We’re hoping to draw more people to the page, expand the information available, and get some lively discussions going.

You’re always welcome to join us at <https://www.facebook.com/AEA.IC.TIG>. We encourage you to like our page, comment on our posts, add your own links, thoughts and pictures, and even start a discussion of your own!

If you have any suggestions for the Facebook page or our expansion into other forms of social media, please feel free to e-mail me at laura@keene-insights.com.

FAQs

by Gail V. Barrington

and What to Do About Them!

Question:

How can I get paid more quickly?

Answer:

There are several ways to ensure that your invoices have a quick turnaround. Try the following:

Think about your client's ability to pay.

Their reputation, the impact of economic conditions on their organization, and their track record for meeting their obligations are clues to their trustworthiness. If you are concerned, ask them pre-pay a portion. Better yet, avoid the project altogether.

Structure your proposals for milestone billing. Clients like this approach because they have regular deliverables. You like it because your project stays on track. Your business likes it because regular payments keep things running smoothly.

Make billing easy. Create an invoice template. Number invoices sequentially.

Make the most of your accounting software. Keep a file folder for each project. Code and file your receipts daily so it's easy to find them at the end of the month.

Bill on time. Each day that your invoice is late has a negative effect on your cash flow. If you haven't been paid because you haven't sent your invoice, you won't be able to pay your vendors or yourself. Your client's 30-day clock only starts ticking when they receive your invoice so until you send it, they have your money for free.

Warm up client relations. Get to know the individual who looks after your client's Accounts Payable. This new best friend can streamline the process for you if you become someone they want to help.

Track your **Accounts Receivable** by due date. Once an account is past due, follow up right away. Typical reasons for late

payment include illness, vacation, Christmas, budget time, year-end, and system glitches. Sometimes people forget or lose your invoice. Predict these issues, find out where your invoice has stalled, and troubleshoot accordingly.

Get it in the bank. When you receive a check, deposit it immediately. I keep my deposit book in my car and go directly from the post office to the bank. Even better, explore **direct deposit** with your client. It's cheaper and faster for everyone.

Why wait? You can put that money to good use right now!

Gail V. Barrington

For more information on consulting topics see Barrington, G. V. (2012). *Consulting Start-up & Management: A Guide for Evaluators & Applied Researchers*. Los Angeles: SAGE.

I invite ideas for topics that interest our members. Send any suggestions for future columns to me at gbarrington@barringtonresearchgrp.com.

Client Competition

by Matt Feldman

In January, Sukey Blanc posted a question on the IC TIG EGroup asking for advice about working with clients who are in competition with each other. I found this to be a terribly interesting topic and thought the TIG would appreciate a summary of the conversation.

Sukey asked about following through with a new client who was seen as competition by one of her current clients. She asked for advice about any issues related to ethics, confidentiality, and transparency. Several themes emerged from the responses: (1) Honesty up front; (2) Importance of confidentiality; (3) Importance of our service; (4) Independence; and (5) Hold the line.

1. **Honesty up front.** It is important to address a potential conflict among current and potential clients before it becomes an issue. Melanie Hwalek said that "being above board is always best if you can manage it." She suggested that evaluators consider how transparent they are with identification of their clients and the work that they do.
2. **Importance of confidentiality.** Most of the responses to the EGroup posting pressed the importance of providing confidentiality about client approaches, particularly with regard to proposals. Leah Goldstein Moses pointed out that

she is very explicit with her clients about what she will and will not share.

3. **Importance of our service.** Eric Graig and Geri Peak made several excellent points that we often provide a valuable service. Geri suggested that her evaluation services serve as the source of unity in a very competitive environment. Eric suggested that our services may be considered a common good given the importance of sharing broad programmatic findings for the benefit of all.
4. **Independence.** Being independent provides us the opportunity to work with many different clients, yet we often need to work among competing clients for the success of our practices. I suggested in my response that as a small, growing, regionally-based practice a non-compete clause would be counter to my ability to grow my business.
5. **Hold the line.** After the previous four points are explained to your client it often makes the most sense to walk away from a potential problem. Susan Wolfe wrote that if your client is uncomfortable then it might be best to refer them to another evaluator. Susan wrote, "If they are strained or conflictual, you may not want to go there because some day it could blow up on you."