2013 Wrap-up

Dear Independent Consulting TIG members,

It has been a great pleasure to serve as the 2013 Chair for the TIG. I enjoyed meeting many of you at the 2013 AEA conference in Washington, DC in October and at our TIG dinner after the business meeting. It was exciting to see such a large turnout at the business meeting. We counted about 90 people, the largest group ever.

In addition to an interesting presentation of the results of an IC TIG member survey conducted by Amy Germuth and an engaging discussion of approaches to finding collaborators and mentors within the TIG, we elected a new group of IC TIG leaders. A description of the IC TIG leadership positions and results for 2014 IC TIG election is included below.

We have a new Media Committee and they have great plans. Thanks to everyone involved in 2013: Matt Feldmann, Laura Keene, Cindy Banyai, Yer Chang, Laura Keene, and Doug Moon. Laura and Matt will fill you in on more details soon.

Thank you all for everything supporting the TIG and for the opportunity to serve as the 2013 Chair. I hope you find a way to connect with others through our TIG Facebook, listserv and website.

Best wishes for a healthy and prosperous 2014.

Randi Nelson

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<tr>
<th>Title</th>
<th>Responsibilities</th>
<th>2013</th>
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<tr>
<td>TIG Chair</td>
<td>• Virtually convenes IC TIG meetings</td>
<td>Randi Nelson</td>
<td>Stephen Maack</td>
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<td>• Facilitates policy/program decisions</td>
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<td>• Runs the AEA conference business meeting</td>
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<td>• Writes an article for and distributes quarterly newsletter</td>
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<td>• Facilitates AEA conference TIG dinner</td>
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<td>TIG Chair-Elect</td>
<td>• Serves as Chair one year after nomination</td>
<td>Stephen Maack</td>
<td>Deb Levy</td>
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<td>• Coordinates AEA 365 IC TIG Week submissions</td>
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<td>Program Chair</td>
<td>• Coordinates of AEA conference proposals review and program 2-year position</td>
<td>Deb Levy</td>
<td>Michelle Burd</td>
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<td>• Works with Program Chair</td>
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<td>• 2-year position overlapping Chair by one year</td>
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<td>Program Co-Chair</td>
<td>• Works with Program Chair</td>
<td>Michelle Burd</td>
<td>Calonie Gray</td>
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<td>• 2-year position overlapping Chair by one year</td>
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<td>Newsletter Content Editor</td>
<td>• Solicits and edits quarterly newsletter contributions</td>
<td>Loretta Kelley</td>
<td>Loretta Kelley</td>
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<tr>
<td>Newsletter Layout Editor</td>
<td>• Puts newsletter content into layout/format for publishing</td>
<td>James Griffith</td>
<td>James Griffith</td>
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<td>Conference Table</td>
<td>At the AEA conference:</td>
<td>Sukey Blanc</td>
<td>Elena Harman</td>
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<td>Coordinator</td>
<td>• Keeps/displays TIG banner</td>
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<td>• Coordinates TIG table for member business cards/brochures</td>
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<td>• Schedules TIG leadership at informational sessions</td>
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2014 Media Committee

Web Coordinator        Matt Feldmann
Social Media Coordinator Laura Keene
Content Creators        Cindy Banyai
                         Mary Nash
                         Jessica Vallejo
                         Gail Barrington

Next newsletter deadline: February 28, 2014

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

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Meet an IC TIG Member: Deb Levy

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. Please describe your independent consulting practice.
I am a sole proprietor with an LLC. Half of my work I do independently and the other half I am part of a team of two or three. This varies year to year but that is generally how my projects break down.

2. What is your disciplinary background?
Public policy and criminal justice- I always planned on going to law school but decided last minute and I mean last minute to just go for my Masters. Some days I regret it but for the most part, I don’t.

3. How long have you been evaluating, and how long have you been an independent consultant?
I have been evaluating for 13 years and have been on my own for almost seven.

My favorite evaluation experience was my first year at AEA as an independent evaluator.

4. Are you primarily qualitative, primarily quantitative, mixed methods? Which do you prefer?
I work with mixed methods. I prefer this as opposed to one or the other. I do however enjoy conducting interviews and focus groups so that may mean more qualitative.

5. What was your favorite evaluation experience?
My favorite evaluation experience was my first year at AEA as an independent evaluator. I went in with a new perspective and purpose and met some great folks. When I was employed and attended AEA I mostly went to learn. Going as an independent evaluator means going to learn but also really focusing on networking.

6. What type of experience have you had that was less than ideal?
More than one…I presented on one at AEA. I had a client change their mind about a project half way through. They decided that they weren’t ready. I spent a lot of time going back and forth with them. There should have been more planning up front but we dove in head first. I assumed they internally decided to hire an evaluator. This was not the case. They broke my contract eventually paid me part of the agreed upon fee. This took a lot of work though. Definitely a lesson learned!

7. Have you had any comical experiences? Describe them.
I have a handful of evaluator colleagues in the DC area. Two of them separately were contacted about a project and individually came to me and asked if I wanted to partner with them. I felt uncomfortable choosing so instead we formed a three person team. It worked out nicely!

8. What do you like to do when you’re not evaluating?
Training for a race of some sort- either a run or a triathlon. I need to stay active or else I get whacky! It’s my personal outlet from my family and my work. I have a great group of friends who also train at the same time so it makes it more fun.

9. Is there anything else you would like for your peers to know about you?
I love being an independent evaluator! It has its ups and downs but ultimately it gives you control over your work and your personal life- if you let it. Also, I truly value all of the contacts and relationships I have formed through the TIG. I have learned so much from knowing all of you!
Findings from the Independent Consultant Survey

I conducted a survey, with the help of IC TIG leaders, in December 2012 about the future of evaluation from their perspective. The impetus for this survey came after I read John Gargani’s blogpost about the future of evaluation (http://evalblog.com/2012/01/30/the-future-of-evaluation-10-predictions). For this survey, all IC TIG members were sent an email with a link to a web survey that included the following questions:

1. What do you see as the top 3 future trends in evaluation over the next 5 years?
2. What do you see as the top 3 future trends in evaluation consulting over the next 5 years?
3. What are the top 3 challenges that you face as a consultant?
4. Given the challenges and trends you have noted, what direction would be useful for the IC TIG going forward?
5. Given the challenges and trends you have noted, what kind of training do you most need?

A total of 124 persons responded; 84% identified themselves as solo practitioners or consultants within small firms (15 or fewer people). Main themes were as follows:

Major trends respondents foresee in evaluation and consulting include:
1. Greater use of evaluation models (including Developmental Evaluation, Participatory Evaluation, Mixed-methods Evaluation, and Systems Evaluation, among others);
2. Increased interest and growth in the number of consultants who conduct evaluations;
3. New evaluation sectors/areas, especially in education, health, policy, and business;
4. Greater use of technology for data collection and management;
5. Less funding for evaluation;
6. Increased needs for capacity-building among funders; and
7. Increased emphasis on data visualization and reporting.

Challenges consultants identified were finding/obtaining work, managing work, keeping up-to-date with methods and technology, helping clients understand evaluation’s value and limitations, and maintaining a work-life balance. Additional concerns were about smaller evaluation budgets and more competition from large evaluation firms.

Given these issues, respondents wanted the IC TIG to foster the development of collaborations across independent consultants, advocate regarding the true costs and value of evaluation, and support more peer coaching while providing training around marketing, new technologies, and client relationships.

Discussion at the October 2013 business meeting revealed that many consultants are already facing some of these trends, especially greater competition from larger firms and smaller budgets. One question that was raised was how to collaborate such that all collaborators are equally well-served. I think this is a great question and one that we as a TIG could consider discussing throughout the year.

Strategic Planning 2014 “Plan to Plan”

At the October 17 IC TIG business meeting Chair Elect Stephen Maack proposed that during the coming year he would lead a strategic planning process for IC TIG. This planning would focus on what we intend to accomplish and how we will direct the organization and its resources toward accomplishing these goals between 2015 and 2019. The planning team will propose and set forth the mission, visions, and goals for the TIG to pursue, with recommended strategies and a time frame for pursuing those goals and implementing the strategies. The results will be presented to the TIG membership for approval by the next AEA annual conference in October 2014.

We will consider questions like the following:

- Who are we and why are we in existence? What should the IC TIG look like by 2019?
- Is it important for the IC TIG to grow in membership? If “yes,” how?
- Should the IC TIG be open only to independent consultants or include small or large firms? What difference would that make?
- What implications does the recent reorganization of AEA have for who we want to be and how we operate within AEA?

How to Volunteer. We welcome both newcomers to strategic planning and those familiar with strategic planning processes. Contact Stephen C. Maack, consultant@reapchange.com, or call (310) 384-9717.
FAQs and What to Do About Them!
by Gail V. Barrington

Question: How can I prepare my business for the coming year?

Answer: As 2014 looms on the horizon, here are three questions that I am thinking about:

1. How can I remain resilient in an uncertain economy and a precarious political environment? What global and financial news do I need to know about to stay on top of the change that is bound to happen? Using contingency planning, can I develop scenarios for the risks and benefits I may encounter for both downward and upward trends? Whatever happens, there will be a trickle-down effect on my small business. How can I be strategic?

2. How can I disrupt the status quo? Who are both my conventional and unconventional competitors and how can I differentiate myself from them? What did I accomplish this year that was truly excellent? What lessons did I learn that could be leveraged into innovation? What cross-cutting trends can I tap into that could transform the way I do business? How can I be innovative?

3. How can I communicate more effectively? How can I reach my target market and support my clients in real time? How can I provide more on-demand feedback? How can I prepare more engaging and interactive reports? What tools, skills, and models do I need to add to my portfolio? How can I be nimble?

I need to dust off my business plan and revisit my key goals:

1. My desired total revenue, predicted expenses, and planned profit;
2. The type and amount of work I want—number and size of projects, types of clients, new or expanded services, and my rolling marketing plan;
3. My plans for professional development and growth.

I will use my evaluation skills to compare my goals, last year to this, the extent to which I met them this time around, and how I plan to measure my success next year. There is much to think about. I can’t really know the future, but I can be nimble, strategic, and innovative—my touchstones for 2014!

Gail V. Barrington

New to Independent Evaluation Consulting? Here are some AEA IC TIG resources for YOU!
by Matt Feldman, Goshen Education Consulting

Recently we had a chance to join our independent colleagues at the AEA conference in Washington, D.C. As usual, I saw a mix of evaluation professionals who have been independent anywhere from 20+ years to less than one week. Two years ago, I joined the AEA IC TIG group in Anaheim as a relatively new consultant and felt overwhelmed and excited to meet with such a dynamic group of folks. I am writing this article to help our new members and remind our existing members about the resources available to you through AEA and the IC TIG.

IC TIG Community Website: http://comm.eval.org/independentconsulting

This site includes several resources such as:
- Virtual Colleagues: A list of individuals with specific evaluation skills who are willing to assist other evaluation consultants
- Newsletters: All TIG newsletters beginning January 2011
- Peer Review Initiative: A process by which other independent consultants will discretely review your finished evaluation reports and provide assistance
- A listing of your officers and their roles

Facebook: https://www.facebook.com/AEA.IC.TIG

A group of five IC TIG members post weekly about issues that affect independent consultants and that may interest evaluators. A look at this blog posting is a great way to start day. So please feel free to “Like Us on Facebook!” The next newsletter will contain more detailed information from Laura Keene, 2014 Social Media Coordinator.

TIG eGroup: http://comm.eval.org/IndependentConsulting/eGroups/PostMessage/?GroupId=187

The TIG eGroup is a listserv through the AEA website that provides a way for the IC TIG members to ask questions and solicit information from one another. This is one of the primary ways the group interacts. If you are ever feeling isolated or lonely, feel free to post a message, and prepare to be surprised at the vibrant community of independent consultants who are doing similar work all over the planet.

Annual Conference:
Next year’s annual conference will be in Denver, Colorado, October 13-18, 2014. The IC TIG always has a rich program of useful sessions, a booth at the welcome session on the first evening, a table to distribute your promotional materials, a business meeting on Thursday evening, and a dinner following the business meeting. This is an excellent time to network and ask those burning questions that you weren’t ready to ask over the eGroup or Facebook. It is also an excellent time to relax and unwind with other professionals who are committed to a similar professional vision.