Volume 7, Issue 1

March 2016

Independent Consulting TIG Newsletter

CHAIR'S CORNER

by Matt Feldman, 2016 IC TIG Chair

I am fed up with the Cub Scouts. The Boy Scouts of America is genuinely a great national organization that provides positive programming for boys from 1st grade through high school. But my son's local Cub Scout Pack is the pits. While the leaders are well meaning, they are poorly prepared to work with children; there is yelling and I genuinely loathe the time I spend with the organization.

The following story is an example of what happened next; how the coincidences in my personal and professional life have supported the possibilities for networking and STEM evaluation business development.

I have a strong belief in niche marketing for my educational consulting practice, which is the belief that if you focus your efforts within one carefully identified market you will be able to develop, sustain, and grow your evaluation practice.

Promoting TIG Members' Success

Using 90-day Plans to Achieve Cash Flow Stability

by Tamara Hamai, Hamai Consulting

We are business owners. We are entrepreneurs. If you're like me, you've spent countless hours reading books, online material, EvalTalk, and the IC TIG listserv messages about how to start and run a successful evaluation consultancy. You've taken Gail's workshop and attended the AEA conference whenever you can. At times your business is stellar -money is flowing in, bills are paid, and you're loving your life. Other times, you've spent the whole month writing proposals that you don't win, as you watch the bills pile up.

Let's stop this cycle of feast and famine, and lead stable, thriving businesses doing the work that we love. As part of the TIG leadership team, I have volunteered to spearhead the implementation of Goal 3 of the Strategic Plan: "Develop and provide relevant, accessible opportunities that enhance IC TIG members' business success."

I will be writing an article in each newsletter this year guided by the objectives of this goal. One way I achieve stability in cash flow and work load is by engaging in 90-day planning, as defined by the Book Yourself Solid System (created by Michael Port).

Step 1: I list all of my mandatory expenses and discretionary expenses for the 90-day period. I calculate how many sales I would need to make to

BACKGROUND. My 8 year old son is tremendously interested in Legos and received a Lego Mindstorms (i.e., kid robot kit) for Christmas. We decided to start a computing club to replace time with the Cub Scouts. I reached out to Code.org, a national non-profit that promotes computer programming for grade school children, which will provide me with training and materials to start a club for my son and others. The problem is that there are no trainings near me in the St. Louis region, most of the trainings are on Saturdays, and I'll have to drive to Iowa (5 hours away).

COINCIDENTAL OPPORTUNITY 1. My local STEM education client has been interested in programming for years, but has not found an opportunity. I briefed her on Code.org and she wants to start local trainings for teachers in our region and plans to attend the session with me in Iowa. This could lead to a discussion on how to further develop funded computing opportunities for local k-12 teachers.

COINCIDENTAL OPPORTUNITY 2. It turns out that the computing faculty member giving the training in Iowa works with my client at the University of Northern Iowa and she is planning to write a computing education grant with him. After discovering this strange turn of events, she has asked me for an evaluation plan for the forthcoming grant.

Someone once said, "Luck Is What Happens When Preparation Meets Opportunity." I believe that this is true when you concentrate your efforts within a niche and keep alert to how coincidences can make for business opportunities.

cover these expenses, given my set services and prices.

Step 2: I create a marketing plan that ensures I achieve the sales goal I set in the first step. I personally write as few proposals as possible, so I estimate how much I need to engage in my networking, outreach, referrals, and web, writing, or speaking strategies (I choose one of these three marketing strategies to focus on each 90 days) to reach my sales goal.

Step 3: I choose a project for improving efficiency, documenting operating procedures, and being more productive with my time and service delivery.

Step 4: I create a day-by-day project plan. This is a daily to-do list that implements all of the goals and activities set forth in the previous steps.

I challenge you to create a 90-day plan for the second quarter this year. Let's work together to make this year a success for each of you! Share your experiences when trying out the 90-day plan. Please email me your thoughts on what you'd like to see in future newsletters, so I can help tailor information to your current business needs.

IC-TIG Survey Findings: Fees and Revenues

by Matt Feldman, IC TIG Chair, Goshen Education Consulting, Inc.

The decennial Independent Consulting TIG survey was completed in October 2015. This newsletter article concerning demographics and fees is the first in a series of articles that will be in the TIG newsletter during the year. Subsequent newsletters will include a report on TIG member concerns and interests from Norma Martinez-Rubin and Nicole Clark and Tania Jarosewich will report on the types of ways members conduct their consulting practices and develop new business.

A web-based survey was sent to all TIG members (N=914) and we received responses from 379 members for a 41% response rate. Most of the respondents (n=315 or 83%) indicated they owned an existing consulting business (the others were assumed to be considering an independent consulting practice and were provided questions about their needs with starting a practice). Among those with active practices, members indicated the state where they primarily worked, which was coded for regions using U.S. Census regions. Members were from North America and Hawaii, with the largest number of responses coming from the southern and western United States regions. (See Table 1.)

Table 1: Respondent Regions, for Members with Active Practices

REGION	#	%
CANADA	25	8%
PUERTO RICO	2	1%
NORTHEAST	48	15%
MIDWEST	52	17%
SOUTH	90	29%
WEST	66	21%
PACIFIC	2	1%
NO RESPONSE	30	10%
TOTAL	**315**	**100%**

Members with active practices had been in practice from 0 – 46 years; the response had a good distribution with 45% in their first 10 years of practice, 29% in their second 10 years of practice, and 20% with more than 20 years in practice. (See Table 2).

Table 2: Years in Practice for Members with Active Practices

YEARS IN PRACTICE	#	%
0 TO 4	60	19%
5 TO 9	82	26%
10 TO 14	45	14%
15 TO 19	48	15%
20+	64	20%
NO RESPONSE	16	5%
TOTAL	**315**	**100%**

Many of the TIG Members responded with the average hourly fees that they charge their clients. The following table indicates average and median fees by region. (See Table 3.)

Table 3: Median & Average Fees per Hour by Region, for Members with Active Practices

REGION	MEDIAN	AVERAGE	#
CANADA	$100	$155	20
PUERTO RICO	*	*	1
NORTHEAST	$100	$103	37
MIDWEST	$100	$109	38
SOUTH	$100	$122	69
WEST	$100	$111	55
PACIFIC	*	*	2
NO STATE	$100	$153	20

RESPONSE			
TOTAL	**$100**	**$121**	**242**

***Numbers removed due to small # of responses**

Overall, average fees charged were $121/hour, though this was affected by a couple of particularly high hourly rates. The median hourly rate for all regions was $100/hour. There was a nice distribution of fees with 40% of the members charging $125/hour or more. (See Tables 3 & 4.)

Table 4: Average Fees per Hour Ranges

FEE RANGE	#	%
<$50	5	2%
$50-$74	33	14%
$75-$99	47	19%
$100-$124	59	24%
$125-$149	46	19%
$150-$174	30	12%
$175-$199	8	3%
$200+	14	6%
Total	**242**	**100%**

As with all analyses, this is a small snapshot of the data with scores of ways to review these data that are not in this short article. The IC TIG survey committee will be posting these analyses and others on the TIG discussion board. Please contact Matt Feldmann if you have a particular interest in the analysis of these data

---

FAQs and What to Do About Them

by Gail Vallance Barrington, Barrington Research Group

Question: What makes a good consulting team?
Answer: Working with a team on a consulting project is a powerful way to expand your scope and attract larger projects, but it takes finesse to get the most out of the team's potential. It's not just about standard work processes like sound contracts and strong evaluation designs. There is something about the chemistry of working with other independent consultants that needs to be attended to. A positive team experience I had recently has made me reflect on its characteristics:

A multi-disciplinary team. Everyone on this team of seven had a different skill set. Several of us had not met before. We needed to be confident of each other's strengths to know who could best perform each task.

1. **Regular contact**. At project start-up, we had two in-person meetings and a dinner to celebrate our new contract. It was important to have a physical reference since we worked in different cities. We then scheduled weekly conference calls for the next year and a half (i.e., the life of the project). These could be cancelled as needed, but having a schedule was better than trying to pull together a meeting when an issue arose. Knowing the Wednesday morning call was coming up helped us solve problems as needed.
2. **An appreciative philosophy.** Our project had an Appreciative Inquiry focus but it was interesting to see how the study philosophy trickled down to how the team functioned. We saw team members' confidence growing as they realized that their contributions were valued.
3. **Regular reporting.** A monthly status report allowed us to track our progress in terms of data collection. We were able to trouble shoot access and response issues quickly and, while this monthly two-pager initially seemed a chore, it turned into a resource for annual reports and conference presentations.

4. **Our own workshops.** Towards the end of the project we facilitated our own workshops to interpret findings and craft recommendations. The final report and associated toolkit were stronger by far than anything we could have produced separately.

The project has been over for six months now but the chemistry continues. We have a dinner scheduled for next month—to talk about another project!

For more information see Barrington, G. V. (2012). Consulting Start-up & Management: A Guide for Evaluators & Applied Researchers. Los Angeles: SAGE. Contact Gail Barrington with questions or suggestions for future columns.

Meet Mary Nash

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

---

1. Please describe your independent consulting practice. I am the sole proprietor of Nash Insights. Evaluation is about one third to one half of what I do. I focus on evaluation, grant writing, and sometimes short-term project management of grant-funded projects. I usually work alone but occasionally have an opportunity to collaborate.

2. What is your disciplinary background? My background is primarily in non-profit management with a focus on education and workforce training. I have an MBA from Boston University's public and nonprofit management program and worked for several years as Executive Director of two different non-profits. In the past few years I've earned Certificates in Evaluation Practice and Analytical Evaluation Methods from The Evaluators' Institute.

3. How long have you been an independent consultant? I've been an independent consultant for the past 20 years. The evaluation component has become a larger part of my practice as organizations have realized the importance of defining goals, using feedback to improve programs, and measuring outcomes. I originally transitioned to consulting to have more flexibility when my children were little. There was no turning back after that, because I really enjoy choosing what I work on and finding new and different opportunities.

4. Are you primarily quantitative, qualitative or mixed methods? Which do you prefer? I use whichever methods are appropriate for the project or program, assessing what works in specific environments. For a recent project at a local hospital, it was clear that in-person communication is appreciated and works well within their culture. With this in mind, I conducted a series of focus groups and interviews with different levels of employees as part of a needs assessment for a new workforce training program. During implementation, surveys were the most effective way to get input from the participants. My surveys almost always have both quantitative and qualitative components.

5. What was your favorite evaluation experience? Every year, I evaluate the Berkshire County Goes to College program, sponsored by Massachusetts College of Liberal Arts. All of the sixth grade public school students in the region, totaling about 1,200, visit one of four college campuses to learn about the college experience. We ask both the students and teachers to complete surveys after the visits to assess students' attitudes about attending college in the future. I enjoy reading the refreshing comments that some of the students make such as "I am looking forward to college because I want a better life than my parents had" and "You can make your own schedule, it looks fun, but it costs a lot more than I thought."

6. Have you had any comical experiences? When I need an evaluation-related chuckle, I look at Chris Lysy's evaluation cartoons. In one of his recent posts,two evaluator cartoon characters are discussing to cut down a 200-page report to two pages so that it will actually get read. I've also taken some courses with Michael Quinn Patton, who is very good at describing the comical side of evaluation.

7. What do you like to do when you're not evaluating? I like to read, cook, and go to spinning and Zumba classes at my fitness club to work off eating what I cooked. I live in the Berkshire Mountains of Western Massachusetts, which is a cultural mecca, especially in the summer. I really enjoy going to see classical and contemporary music and modern dance.

8. Is there anything else you would like your peers to know about you? I am the co-chair of the IC-TIG's media committee. This involves keeping our website current and relevant and helping to keep TIG members informed and communicating with one another. I'd love to hear from any of you who have new ideas for how we communicate. Contact me at msnash3@gmail.com.

ANNOUNCEMENTS:

- **The IC TIG is looking for volunteers to review conference abstracts** for the 2016 AEA Conference. Contact Tamara Hamai or David Gill if you would like to volunteer.

- **Michelle Molina has started an IC TIG book club.** It is designed for evaluators to learn, discuss and reflect on evaluation topics by reading materials. The first book they will be reading is ***How to Measure Anything.*** Please go on the eGroup and get details about the book club if you are interested or contact Michelle for more information.

- **We have redesigned the newsletter to an email format** to make it easier to send out, edit, track and access on different devices. Your feedback would be very helpful! Contact Mary Nash with any suggestions or thoughts about the new format.

- **Next newsletter deadline: May 31, 2016.** Please send questions, submissions or suggestions to Loretta Kelley.