

Spring 2011

Independent Consultants TIG Newsletter

Message from the 2011 TIG Chair — Norma Martinez-Rubin

A few evenings ago, I was talking with my husband about anticipated events: a week-long trip with my relatives in April, travel across country for a May meeting to discuss the review of a national project with colleagues, and travel together to catch some Padres/Giants baseball games in July. After about 23 minutes of verbally describing who would participate in the trips where he wasn't involved, I noticed a glazed look in his eyes that signaled TMI (Too Much Information).

I'd entered the TMI Zone when my enthusiasm provoked increasing detail that was irrelevant to my audience.

Calamity! What to do? My initial response is to appear puzzled at my husband's disinterest. ("What? You don't care about what's of interest to me?") Alternative thought: "How can my story-telling narrative not be as stimulating to you as it is to me?")

Fortunately, we know that neither is going to leave each other and find another life partner over the matters where we have varying degrees of interest. There are underlying common values that keep us together. So, with calm reassessment of how it's possible that I may bore my audience with irrelevant information, I redirected the conversation ever-so-stealthily with direct inquiry: "Tell me about what's going on with you."

When it comes to meeting with clients or colleagues, there are plenty of opportunities for exchange that

becomes one-sided. We can't afford that with prospective clients who have limited time and are tacitly assessing our ability to be concise, detect what their needs are, and present our best indication of the values that underlie our consulting practice.

Recently I attended a three-day workshop presented by a co-author of the *Facilitator's Guide To Participatory Decision-Making*. My interest in the workshop stemmed from being in too many meetings where discussion occurs, but the point of it gets lost or too many points are made and some are not captured as relevant to the benefit of the group.

Sound familiar?

I learned about something the workshop developers call the "Groan Zone," that time and space when much divergent communication occurs before there is any resolution, i.e., decision-making for the group to consider that progress has occurred.

As evaluation consultants, entering the TMI Zone or Groan Zone is unproductive: Many of us are wired for convergence, synthesis, analysis, and finding solutions. We simply can't ignore, however, that we sometimes enter these zones, and that finding our way out of them is a responsibility we have to each other and our clients.

How to improve our skills in doing so: practice!



Consider, too: A facilitator's role is to help a group do its best thinking. A consultant's role requires us to be open to ambiguity and negotiation.

An evaluator's role . . . I believe it's to assist a client make sense of information of various types and from variant sources, with multiple interpretations, and diverse values that influence and affect them. Tell me, what do you believe?

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Calling All TIG Authors

The IC TIG newsletter needs your help!

We would like to feature the work of our colleagues, share information about successes, and make this newsletter a vehicle for sharing with one another.

Please feel free to submit short articles, send us a note about an upcoming event, or drop us a line with ideas.

Deadlines for 2011 are May 31, August 31, and November 30.

Please send submissions to your newsletter editors:

Susan Wolfe at
susan.wolfe@susanwolfeandassociates.net

and/or MaryLynn Quartaroli at
Marylenn.Quartaroli@nau.edu

*"First get your facts;
then you can distort
them at your leisure."*

Mark Twain

*"The pure and simple
truth is rarely pure
and never simple."*

Oscar Wilde



Meet an IC TIG Member

Each quarter we will feature an IC TIG member in this newsletter. Send your suggestions for future interviewees to Susan Wolfe susan.wolfe@susanwolfeandassociates.net

Deborah Levy: SuccessLinks, LLC

Please describe your independent consulting practice.

I am a sole proprietor, although I partner with one or two people on many of my projects. My evaluation work is 90% of my time and income. At the same time I left my full-time job in 2007 to be an independent consultant, I became a certified personal trainer. I always had an interest in fitness, and had taught Spinning and a few other classes at local gyms, but had a vision of somehow being able to do both.

Once I became certified, I began training three women in their homes who had just had babies. I wanted to focus on post-natal fitness because of the experiences I had after having my two kids. Exercise and activity keeps a mom from going crazy those first few months, no matter how much lack of sleep there is!

After a year of personal training, I decided to leave that behind and establish an outdoor fitness boot camp with a friend of mine who also has a primary career and wanted to make fitness a second career. Three years later, we are running strong with a great following and ongoing back to back sessions.

What is your disciplinary background?

I have a Master's in Justice, Law, and Society and B.A. in Sociology

How long have you been evaluating, and how long have you been an independent consultant?

I have been evaluating for 12 years but on my own for four years (May is exactly four years).

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

I prefer mixed methods but generally don't work with heavy duty academic quantitative stuff. If I need it, I subcontract out.

What was your favorite evaluation experience?

My favorite evaluation experience was learning that a client made programmatic changes within six months of receiving my final report. This demonstrated that my work was used and the client cared about what I had to say.

What type of experience have you had that was less than ideal?

I was roped into writing a fairly large evaluation section of a grant over Memorial Day weekend, just as I had left my job to pursue consulting. My family hung out at the beach while I sat in a coffee shop making a logic model and an evaluation plan. After submitting the grant, I never heard one word

from the organization — not even an email.

Have you had any comical experiences? Describe them.

I didn't win a proposal I submitted to a small nonprofit. They said they had an opportunity to work with a local firm they had wanted to for some time now, and the firm had come in within their budget. I understood and went on about my work. A week later, the same firm called and explained they had recently won a contract and they needed to find someone to work on it. Now I know how they came in within budget! I didn't accept the opportunity.

What do you like to do when you're not evaluating?

Hang out with my family and friends (and dog), travel, take bike rides, and the occasional home improvement project.

Is there anything else you would like for your peers to know about you?

Independent consulting was the best professional and personal jump I could have made. You don't have to be a seasoned evaluator and have a Ph. D. to begin a consulting practice. Creativity, a drive to succeed, and the ability to reach out to others proved much more worthwhile!

“Independent consulting was the best professional and personal jump I could have made.”



Deb Levy
2011 IC TIG Program
Co-Chair

IC TIG New On-Line Home

By [Geri Lyn Peak](#)

The IC TIG made the switch to the new AEA Community Forums last summer. Here's a brief overview of our new on-line TIG home, and how to participate.

Sign in at <http://eval.org>.

Use the "Community" drop down menu to select egroups/forums/subscriptions.

View the list of the all of the recent discussions in the AEA forums and TIGs. Unless the groups have restricted membership, you can read any of them from here. Your subscribed lists will be in bold.

Click on the "My Profile" drop down menu and choose "My Communities" to see and sign up for this TIG and other groups. To the left, you'll find a menu of actions to manage your responses and subscriptions, and customize your profile and signature.

Select "My Subscriptions" to manage our TIG eGroup along with any other TIG or forum subscriptions you already have. Our TIG agreed to make our eGroup a cozy home where we can consult openly. Be sure to subscribe to take advantage of

our discussions and members only resources (TIG membership will not automatically opt you in). You will want to sign up—currently, our discussion is the most lively, with more than twice as many subscribers than all but two other TIGs and better than 10 times more posts than the next most active TIG.

Also, you will find that we only have a list library composed of attachments to messages and we do not host an open library. Items to be shared more broadly can be added to our resource page.

Once you have signed up, you can interact with your colleagues directly through email, just as we did with our old group in the past. Messages come directly to your selected email address. Reply links allow you to reply to the sender or back to the group with just an extra click or two. If you save your login credentials to your browser, it's easy to get right to the response screen. Official AEA emails usually contain your login credentials for convenience. This is just a taste of what our website has to offer. You can reach your webmasters via the [IC TIG resources](#) page. Enjoy!

IC TIG AEA 365 Week

The IC TIG 365 Week was April 3-8. In case you missed it, go to the AEA web page and browse the 365 blog entries.

Our contributors and their topics were

- ◆ Amy Germuth: *Evaluating your own consulting practice*

- ◆ Marty Henry: *Collaboration*
- ◆ Susan Wolfe: *Networking*
- ◆ Gail Barrington: *Living ethics*
- ◆ Michelle Burd: *Bartering*
- ◆ Norma Martinez-Rubin: *Straddling multiple organizations*

Thanks to all for a great week!!

"I'm so glad I joined this TIG! The newsletter and especially the evaluation report review group is a lifeline for someone like me who is a former independent consultant (and loved that role) and now in an alternative role without time to stay up-to-date on activities and issues of independent consultants."

Janet Smith, Internal evaluator for a Boston non-profit and IC TIG member

SAGE To Publish Gail Barrington's New Book

Congratulations to Gail Barrington on the publication of her new book *Consulting Start-up & Management: A Guide for Evaluators & Applied Researchers* due out this Fall! It includes a ton of practical and useful information for those who are considering taking the plunge to consulting, those who are starting a consulting practice,

and seasoned consultants.

The book provides a synthesis of the management consulting literature, evaluation and applied research processes, and entrepreneurial and small business skills. It is relevant for all consultants who are considering going out on their own or who want to fine-tune their current business practice. It provides valuable samples and

worksheets along with insider tips, trade secrets, and personal anecdotes. Find out how to get started, set fees, find work, and manage your time and money. Look at ways to set up your ownership structure and business systems, how to manage contracts, and how to work with sub-contractors and staff. The popular workshops that Barrington has been offering

since 1993 have helped many professional researchers determine if they have what it takes to become successful consultants. This book has been prepared in response to their need for more information about this exhilarating but challenging career path. With Barrington at your elbow to provide guidance and encouragement, independent practitioners have a roadmap to ensure their success. This will be an invaluable resource for all!

2011 TIG Chair

Norma Martinez-Rubin
Evaluation Focused Consulting
Norma@EvaluationFocused.com

2011 Program Co-Chairs

Rita S. Fierro
Independent Research and Evaluation
Consultant
fierro_evaluation@gmail.com

Deborah Levy
SuccessLinks, LLC
deblevy@successlinks.biz

Susan M. Wolfe
Susan Wolfe and Associates, LLC
Susan.wolfe@susanwolfeandassociates.net

2011 Webmasters

Stephen Maack
Reap Change Consultants
consultant@reapchange.com

Geri Lynn Peak
Two Gems Consulting Services
geri@twogemsconsulting.com

The Independent Consultants (IC) Topical Interest Group (TIG) members are sole proprietors, or have formed limited liability companies, partnerships, or corporations who work alone, with small staffs, or “as needed” sub-contractors Our backgrounds are as varied as most of AEA. What we share in common is collegial and friendly support of one another as independent evaluators. Please review the complete mission statement at the website and send your comments and suggestions to the TIG chair.

IC TIG MISSION STATEMENT IN BRIEF (DRAFT)

- Foster a community of independent evaluators by reducing the isolation of being an independent proprietor.
- Promote independent consulting as an evaluation profession.
- Increase the professionalism of independent consultants



IC TIG Conference Proposal Review Process

This year the IC TIG program is co-chaired by Rita Fierro, Deb Levy, and Susan Wolfe. Here is an overview of the review process that will be implemented:

Proposals were due on or before March 18th. By March 25th AEA sent the lead program chair a list of potential reviewers who volunteered for this TIG. On April 4th the materials were sent to the lead program chair, who then shared them with the co-chairs. All review the materials immediately so that by April 7th those that do not fit this TIG can be redirected.

On or after April 7th the co-chairs will contact potential reviewers to determine who is still able to participate. Although efforts will be made to give as many TIG members as possible an opportunity to participate, the actual number of reviewers will depend on

how many proposals are received. Each proposal will be reviewed by the co-chairs and at least 2 TIG members.

Review criteria include:

- ◆ Relevance to AEA
- ◆ Relevance to the TIG
- ◆ Technical Quality
- ◆ Innovativeness
- ◆ Development
- ◆ Diversity of Presentations
- ◆ Focus of Method, Theory, Policy, Practice
- ◆ Discussion of Consulting Projects
- ◆ Alignment with Conference Theme
- ◆ Overall Assessment and Recommendation

Reviews and TIG recommendations will be completed and submitted to AEA on or before May 5th. Recommendations for co-sponsoring TIGs will be sent by May 19th.

The notices as to whether proposals were rejected or accepted will be sent on or before July 8th when the program will be available online and conference registration opened.

