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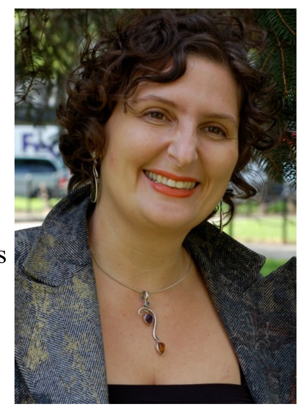
Independent Consulting TIG Newsletter

Rethinking Our Challenges by Rita S. Fierro 2012 TIG Chair

What would a client relationship look like if we plan for discomfort instead of avoiding it? At AEA's conference this year, I presented on how complexity theory can be used to understand client relationships. I used [Snowden's Cynefin framework] to illustrate how evaluators and clients often have different comfort zones from which they operate, and how these zones are likely to be challenged throughout the consulting relationship. In the Cynefin model, there are four quadrants that represent four possible explanations for any given situation: Simple, Complicated, Complex, and Chaotic. While evaluators' comfort area tends to be in the "Complicated" quadrant (researchers are not intimidated by situations with a variety of components), our clients tend to operate from the "Simple" quadrant (e.g., a cause-effect relationship "just tell me what to do and we'll get it done"). While clients fear entering the "Chaos" quadrant (e.g., loss of control or funding), evaluators may fear working within the "Complex" quadrant, as emerging, unpredictable situations can drain our resources and require additional time.

As evaluators we can: 1) Know our client's comfort zones and areas of challenge; 2) Nudge our clients out of their comfort zones by helping them embrace new and surprising ways of thinking; and 3) Find a balance between a client's priorities, what we know, and what new possibilities the client can welcome. It is important to avoid getting trapped by a client's assumptions and reframe challenging relationships from a viewpoint of possibility and opportunity. I had a client who asked at each deliverable for more than we had budgeted. When told that their request was beyond the scope of work, they then questioned the quality of the deliverable. The dynamic is a common one, and I had to resist becoming defensive. I met with my team members to reframe the growing tension. We dug deeper and realized what was happening below the surface. We developed some questions that enabled us to understand the challenging dynamic in an empowering way and embrace the tensions. We had offered an innovative theoretical approach to a client who certainly needed it, but the client experienced the discomfort of innovation because they resisted complexity. Until we were locked in the client's way of thinking, we did too. Reframing helped us to embrace complexity by rethinking the problem. Challenging client relationships can hold deeper meaning for the growth of our professional practices.



How can you grow?

Inside this issue:

Looking Forward: Innovative Ideas for the IC-TIG

By Elayne Vlahaki, *Catalyst Research Group*, Vancouver, BC, Canada
& Kim van der Woerd, *Reciprocal Consulting*, Vancouver, BC, Canada

During the IC TIG business meeting at AEA 2012, TIG members were asked to participate in a World Café, facilitated by Rita Fierro. This World Café explored two questions about how the IC TIG can better serve its members and have a larger impact in the upcoming year. The passion and excitement in the room discussing these two questions match the creativity and enthusiasm for the ideas going forward. We are excited to build on existing IC TIG work and move productively toward the future.

See Page 3 for the questions and a summary of World Café participants' responses.

"You get what you settle for."
Thelma & Louise

Next newsletter article deadline: February 28

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

Meet an IC TIG Member

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

Stephen Maack, 2013 IC-TIG Chair-Elect

"...if you can't smile or laugh at such things you probably would do better not to be an independent consultant. Murphy's law does rule…"

Stephen Maack

Reap Change Consultants

1. Please describe your independent consulting practice. I am a sole proprietor owner of REAP Change Consultants (REAP Change), a for-profit firm founded in 2002. I am (or attempt to be) a full-time consultant. If you do good research, evaluation, assessment, and planning for an organization or project, you reap what you sow, and you reap change (so the name of my firm). I work nationally and would consider working internationally, in education arenas, with libraries, or health-related jobs. Jan Upton and I wrote an article for the 2006 *New Directions for Evaluation* volume on Independent Consulting (No. 111) titled "Collaborative Relationships in Evaluation Consulting." We have been consulting together off and on since 2003 but have yet to meet in person.

2. What is your disciplinary background? I have degrees in Cultural Anthropology, including a baccalaureate from the University of Illinois (Champaign-Urbana) with minors in Mathematics and French, a Master of Philosophy and Doctorate from Columbia University with specialties in social change, economic anthropology, and African cultures.

3. How long have you been evaluating, and how long have you been an independent consultant? I have done evaluation since the mid-1980s when I was Senior Planner, then Assistant Director of Planning, Research and Development, at the Chicago Housing Authority. I also did evaluation for seven years while a Director of Institutional Research at the University of La Verne and at Rio Hondo Community College in California.

4. Are you primarily qualitative, primarily quantitative, mixed methods? Which do you prefer? Before becoming an anthropologist, I was a mathematics major and learned SPSS in about 1975. I do statistics through logistic and multiple regression. I am fluent in both quantitative and qualitative methods, but prefer mixed methods evaluation. I think that the stories from qualitative research flesh out the statistics and the statistics help justify the stories.

5. What was your favorite evaluation experience? I was called in by the director of a major medical university library to evaluate student use of the academic library. She was concerned that earlier research had only served medical and academic researchers; she wanted to understand the needs of students so she could serve them better. I not only liked her but appreciated her wanting to base her decision on evidence and serve all her clientele.

6. What type of experience have you had that was less than ideal? My first consulting job involved analyzing data for evaluating a computer system designed for use by low-income and minority AIDS/ HIV-positive people to learn about their disease. There were flaws in the client-provided design, so I was not able to produce any reliable and valid statistics regarding whether use of the system correlated with medical measures of improved health for HIV/AIDS patients.

7.Have you had any comical experiences? Describe them. Comical? Me? I'm considered a pretty serious guy and a straight shooter. The things that amuse me are human foibles and lack of attention to details...including my own. if you can't smile or laugh at such things you probably would do better not to be an independent consultant. Murphy's law does rule...

8. What do you like to do when you're not evaluating? Performing music keeps my soul together. I learned piano at age 8, tuba in 6th grade, and have been singing in excellent church choirs since my senior year in college. I'm trained as a classical musician, but enjoy almost all kinds of music. I also like photography.

9. Is there anything else you would like for your peers to know about you? I'm a change agent who likes to work in start-up situations. Also, GIS (computer mapping) is a recent passion, more for the analysis prospects than for the actual map production. I enjoy good teamwork with other consultants from a variety of backgrounds.

Seven Steps to Being a Successful Independent Evaluation Consultant

By Amy Germuth

EvalWorks, Durham,NC

A 2009 article by Skolits et al. identified roles evaluators often assume. These include: Manager, Negotiator, Detective, Diplomat, Judge, Reporter, Learner, and Researcher. If you are an independent evaluation consultant, you have identified another role you must take on: consultant. Here's the rub - the consultant's role is really a placeholder for multiple other roles: marketer, entrepreneur, boss, accountant, etc. That's many roles, and mastering the skills these roles require may seem quite daunting. So daunting that you might ask: How does one become a successful independent evaluation consultant? It's a good question and I'm glad you asked! Here are seven steps to help you along this journey.

1. **Recognize that as an evaluation consultant you need two sets of skills – evaluation skills and consulting skills**. One of these skill sets will not suffice. Gain these skills by reading in these fields.
2. **Understand that to be successful you will have to play many roles beyond evaluator and consultant.** As I noted before, these may include marketer, entrepreneur, boss, accountant, etc. Failing to attend to these roles or letting one role dominate increases the odds your business will fail.
3. **Market, market, market**. Being a successful consultant requires knowing how to market yourself and your business. Continually look for opportunities to get your name and your business's name known among family, friends, and competitors/ collaborators, but most importantly, by those likely to purchase your services.
4. **Recognize that consulting and marketing are about building relationships.** Stop talking, start listening. Become part of the community you want to serve. Identify ways you can work with others that bring value to their work.
5. **Position yourself differently from others by identifying the unique value you offer to clients.** Notice that I did not say unique *service*. What matters most to clients are not what services you provide, but the value your clients perceive in working with you specifically.
6. **Prepare to work long hours as an evaluation consultant**. This is partly because you will play many roles. Hopefully being an evaluation consultant will be the best 60 hour a week job you've ever worked!
7. **Celebrate!** Every step you take is one step towards becoming a successful independent evaluation consultant.

Skolits, G., Morrow, J., & Burr, E. (2009). Reconceptualizing evaluator roles. *American Journal of Evaluation, 30*, 275-295.

Innovative Ideas for the IC-TIG

continued from page 1

By Elayne Vlahaki, Catalyst Research Group, Vancouver, BC, Canada
& Kim van der Woerd, Reciprocal Consulting, Vancouver, BC, Canada

[Independent Consulting TIG website]

[IC TIG on Facebook]

How could the IC TIG meet your needs in a fuller way next year?

- Networking - More opportunities to network with our fellow TIG members, and list IC member websites on the IC TIG website
- Mentoring - opportunities for junior ICs
- Skill building opportunities - for ICs, such as webinars that focus on business skills development
- Share information - More opportunities to share among IC TIG members; easier access to online resources relevant to IC TIG members; continue with AEA 365 blog; and increase the frequency of the IC TIG newsletter
- Strategic planning for the IC TIG
- Nourish opportunities of ICs to collaborate in work

How could the IC TIG be a collective ground breaking force on a much larger scale?

- Skill building – in the areas of ethics, and insurance; and mentor junior ICs.
- Networking – with diverse groups, connect with local ICs, and use LinkedIn to network.
- Collaborating – learn about other TIG members' specialties so they could share work when appropriate; partnering as a whole TIG on an RFP ("crowd sourcing"); and collaborating through social media.
- Advocacy – on issues that negatively impacting ICs; as well as the value of hiring larger firms.

Finally, members suggested promoting the TIG, and taking a leadership role at the AEA conference by helping to organize the conference, and having keynote speakers who are ICs.

2013 TIG Chair
Randi K. Nelson
Partners in Evaluation, LLC
eval.partners.nelson@gmail.com

2013 Chair-Elect
Stephen Maack
Reap Change Consultants
consultant@reapchange.com

2013 Program Co-Chairs
Deborah Levy
SuccessLinks, LLC
deblevy@successlinks.biz

Michelle B. Burd
Burd's Eye View Research & Evaluation
michelle@burdseyeview.net

2012 Webmaster & Media Committee Chair
Matt Feldmann
Goshen Education Consulting
mfeldmann@goshenedu.com

Media Committee
Yer Chang yer.chang7@gmail.com
Laura Keene laura@keene-insights.com
Doug Moon dougmoon23@gmail.com

The Independent Consulting (IC) Topical Interest Group 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.

IC TIG Mission Statement In Brief

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

The complete text of the mission statement is on the IC TIG website below.

AEA2012
Friendly gang of IC-TIG members (Left to Right)
- Amy Germuth
- Mike Herrick
- Rita Fierro
- Fred Glantz
- Norma Martinez-Rubin
- Robert Hoke

Peer Review and Virtual Colleagues: Valuable Services of the IC-TIG

By Fred Glantz
Kokopelli Associates LLC, Santa Fe, NM

Prior to forming my own company, Kokopelli Associates LLC, I worked for 30 years at Abt Associates. Working on my own took a lot of getting used to. I missed several things that I took for granted as an employee of a large company. I found that I could do without a secretary and I bill my clients for research assistants that I hire on an as-needed basis. I can't just pick up my phone and call the company's IT department and have someone immediately fix my problem. And, I no longer had colleagues whom I could have review and critique my work and help me out with knotty issues. However, the IC TIG can provide independent consultants with two valuable services—Peer Review and Virtual Colleagues.

Peer Review
It was company policy at Abt Associates to have a Senior, or Principal Associate review and signoff on all contract deliverables before they could be sent to the client. Quality control is critical to the success of any business and I am fortunate enough to have a large network of former colleagues (some retired and some not) who are kind enough to review and provide the necessary feedback to help ensure that my deliverables are of the highest possible quality on a pro bono basis. At my first IC TIG meeting I learned that the IC TIG provides voluntary peer review for its members. I immediately volunteered to serve as a peer reviewer and was trained by Sally Bond on the review process used by our TIG. While I have served as a peer reviewer, it quickly became clear that our membership was not taking advantage of this important and valuable service. Peer review is provided pro bono to any IC TIG member who wants to have a report reviewed before, or after, sending it to the client. I can't overstate the importance of having someone else review and provide comments on your work.

Virtual Colleagues
Perhaps the thing that I miss the most about not working for a large company is the ongoing support of my colleagues on a real time basis. The IC TIG fills this void. Our TIG now provides its members with "Virtual Colleagues" whom they can turn to for some quick assistance. I will have more on Virtual Colleagues in the next newsletter. But for now, check out the Virtual Colleague page on the TIG's website.