



June 2016

# Independent Consulting TIG Newsletter

## CHAIR'S CORNER

by Matt Feldmann, 2016 IC TIG Chair



I'm in "the weeds." "The weeds" is a term I picked up from the restaurant business for when things appear out of control. We've all been there (and I am willing to bet that many of you are in this very place right now). You need to send out monthly billings, you are working on the BIG proposal, there is a client who wants to see the first draft of a report, you are preparing instruments for an upcoming session, you have meetings stacked up, and then...in the middle of it all...your very important/needy client needs you to drop everything to complete something mundane.

I remember there were always a couple of restaurant servers who could handle this better than others, and these reflections still help me today. The following are a couple of things I try to remember when I am in "the weeds."

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## The road to social impact is paved with good slogans

by Rita S. Fierro, AEA Board nominee

In March, I had the belly-bursting pleasure to be nominated to the AEA Board by Stephen Maack. I was just notified that I will be on the ballot, so all AEA members will see my Nominee Statement. As the former chair of the IC TIG, I'm offering you an inside scoop.

A core aspect of my vision for AEA is: "to grow our relationship to the business world and our presence in international policy." My work with [Fierro Consulting](#) focuses on inclusion, inequity, and facilitation in evaluation. I'm running a series of [10 tips on inclusive conversations](#) on my blog, I have worked on [international projects](#), and I co-edited the latest [New Directions for Evaluation](#). So why would I care about growing our relationship to the business world?

AEA can play a critical role in strengthening equality worldwide.

A few months ago, the United Nations set its [2020 Evaluation Agenda](#). AEA [responded](#) that it aims: "not to dominate from a position of power...but to share expertise that supports the Global Agenda with its focus on social justice, equity, and gender responsiveness." We can: "frame evaluation as a strategy that can make visible structural inequalities." I was pleased to see AEA take a stronger stand in exposing inequality.

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## Evaluation focused consulting

by Norma Martinez-Rubin, Program Evaluation Consultant

*“Control over quality of evaluation research project work ... how the business is run. Opportunity to pursue... my research interests.”*

— IC TIG 2015 Decennial Survey Respondent

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The above encapsulates what attracted a subset (n=141) of IC TIG members who completed last fall’s decennial survey. Among these respondents, about a third engaged in independent evaluation consulting part-time; the majority (66%) engaged in it full-time. Part-timers reported an average of 92% of their total 2014 income was a direct result of their evaluation practice. Among full-time evaluation consultants, the average was 96%.

Other attractive characteristics of independent evaluation consulting mentioned by this group were flexibility, a variety of projects, choice of co-workers, and involvement in multiple aspects of evaluation. The majority of these consultants deliberately chose the profession, while a handful had “fallen into” it due to economic shifts or after having left an employer for different reasons. Some realized that employer-based settings limited their creativity or proved otherwise unsatisfactory.

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### **Meet IC TIG member Sharon Ghuman, Goldfinch Research Group**

*Starting a consulting practice is quite a journey! It takes a lot of patience, tolerating huge uncertainty, and it’s not often obvious what the next step is.*

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**1. How long have you been an independent consultant?**

For about a year, so not long. It's challenging – and fun.

## **2. Please describe your independent consulting practice.**

I'm interested in health and social outcomes and reducing inequality, and usually do research and evaluation related to disadvantaged groups – those underserved, or low-income communities of color, for example. I do U.S. and international projects. So far I've done a performance evaluation, provided statistical expertise and analysis, and translated research into intuitive terms for non-researchers. A new thing I'm doing is 'research strategy' – helping institutions shape evaluation priorities, how to do the work, where to disseminate it. I work as a sole proprietor, but my projects are very collaborative and often involve a team. I would love to partner up with other consultants in the future! I love working closely with each institution/colleague and immersing myself in a project, and as a small entity I keep my workload manageable so I can do that.

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## **The IC TIG guide to budgeting for success** by Tamara Hamai, Hamai Consulting

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### **We have to spend money, but what do we spend it on? How should we spend it?**

This month, I'm opening the kimono (TMI?) on my budget in an effort to show you some of the ways you can run a cost-efficient business using modern tools and services. I'm huge on using cloud services, since I live a location independent lifestyle and do not live near my clients. I've shopped around and experimented with lots of different tools, services, and companies since I first started consulting in 2008. I'm super happy with my current set-up.

Here are my annual business expenses, by category. Side note, I am not an affiliate of any of these services. I'm just a pleased customer. Of course, costs may vary depending on your business needs. My budget is purely an example to give you ideas about how you might be able to streamline your business costs and operations.

**First priority for me is insurance and business registration.** Minimizing my personal liability is critical to me. Each year, I'm required to file a statement of information in the state where my business resides (\$100 per year) and I have a Registered Agent to receive any legal or official messages (\$49 per year). I purchase general liability, business office, and professional liability insurance policies from Hiscox for \$943 per year. Since I travel frequently, I purchase travel insurance that covers everywhere in the world for almost everything. There's no better coverage for the cost than World Nomad Travel Insurance at \$1,333 per year. You, of course, could save money by purchasing insurance for specific locations and dates, if you travel less frequently. **Subtotal: \$2,425.00**

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# FAQs and what to do about them!

by Gail Vallance Barrington, President, Barrington Research Group

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## QUESTION:

How can I market when I don't have time?

## ANSWER:

Passive marketing will spread the word so try these strategies suggested by our IC colleagues.

### 1. Talk about what you love

Don't be modest—be excited! Incidental conversations can build your reputation. At conferences, Jean Eells always chats about her work and hands out business cards. You can talk generically to clients about your work on other projects. Let your enthusiasm shine and focus on your methodology and cool new techniques. Pretty soon they will want what you have too.

### 2. Eat lunch

You need to drink coffee and eat lunch anyway so use the time profitably. Schedule regular dates with colleagues, past clients and contacts with access to organizations you are interested in. It's a good time to ask for referrals. Mary Murray's approach is to say, "I am looking for one or two more projects for the coming year and I'm hoping you can help me brainstorm about who to reach out to." Your colleagues may also need assistance on a current project or have a lead on something new and they can provide you with needed support, as Ram Nayar suggests.

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## A message from Michelle Molina...

**The IC-TIG Evaluation Book Club** will be selecting a new book to focus on soon. Feel free to rate [readings](#) on this [form](#). Here is a list of the current top picks:

1. [Thinking fast, Thinking Slow](#)
2. [Interactive Evaluation Practice](#)
3. [The Facilitator's Guide to Participatory Decision Making](#)

The book club will also be reading articles from the last ***New Directions for Evaluation: Evaluation and Facilitation***. Here is a list of the articles we will be discussing:

1. **Enhancing Facilitation Skills: Dancing with Dynamic Tensions**
2. **Planning and Facilitating Working Sessions with Evaluation Stakeholders**
3. **Facilitating Interactive Evaluation Practice: Engaging Stakeholders Constructively**
4. **Data Placemats: A Facilitative Technique Designed to Enhance Stakeholder Understanding of Data**

If you are interested in learning more and participating please contact [Michelle Molina](#). You can also visit the book club's [website](#).

# ANNOUNCEMENTS:

- Make sure to mark your calendar for the [AEA Conference, Evaluation + Design, October 24-29](#).
- **Next newsletter deadline: August 31, 2016.** Please send questions, submissions or suggestions to [Loretta Kelley](#).

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