

Summer 2011

Independent Consultants TIG Newsletter

Rhythms and Seasons

I'm uncertain whether I am a diurnal or nocturnal creature. I prefer natural sunlight for work that requires an intense number of hours at a computer, but love the calm and quiet of the night to think through that which requires focus and concentration.

Lately, my mini schnauzer has had a shift in his circadian rhythm. That has certainly affected my own. His bark awakens me much earlier than what I like, but I appreciate his consistency and reliability. I know upon hearing his call to go outdoors that he expects his human companion to be as amenable and eager to join him in response to physiological needs.

Admittedly, it takes a good quarter-hour for me to be as lively as he upon leaving the comfortable spot he'd been resting on minutes earlier. It's only on rainy mornings when the reverse occurs. I jump out of bed earlier than he and avenge—not in a mean way—and get some satisfaction being the one to prod him to carry on and out, splash in the rain, and return after a productive walk.

The climate changes we've experienced across the country this year have been quite striking. They've also required an assortment of gear, clothing, and attitudes to bear weather and temperature shifts that can widely range from morning to evening. Technically, it's summer, yet in the San Francisco Bay area, for example, it rained

by Norma Martinez-Rubin, TIG Chair

around June 21st! Most unusual!

What to make of these erratic times? What are the parallels to the business of evaluation practice? I'll list a few in the hope that your observational skills, as polished as they may be, will remain heightened come rain or shine. (Note: This should connote feast or famine, scarcity or abundance, economic boom or recession. You get the picture.)

The usual seasonal markers to which we might be accustomed could very well be gone. Keep note of progress reaching your own milestones and reflect on what contributed to it. Do more (e.g., networking, skills-building, extending beyond a comfort zone, etc.) of what you identify worked for you. The visual data (photo images, text messages, electronic presentations, artifacts) you collect document what you value for yourself and your clients. Periodically sort through that for continued inspiration.

When you reluctantly address financial aspects of your work (e.g., administrative costs, invoicing, tax set-asides, payroll, etc.) take it as a clue. You might need to hire a financial pro or advisor to assist getting through necessary considerations for the life of your practice. Take stock of your financial assets, business costs, revenues, and your business break-even point.



Solo practitioners and evaluation teams occasionally need a boost, push, or pull toward success at any time of the year. The American Evaluation Association and Topical Interest Groups offer some of these. Thank you for participating. I look forward to meeting you in Anaheim in the fall.

Got to go; I hear a loyal friend's persistent bark.

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WANTED

IC TIG Table Coordinator: A friendly, courteous, creative member to set up, host, and break down the IC TIG Table at the AEA Annual Conference in Anaheim, CA, November 2-4, 2012.

The coordinator has a fun, low-stress opportunity to serve the membership during some of the conference breaks. You'll be provided tips on doing so plus you get to add your flair to our exhibit. Send an email to Norma at

norma@evaluationfocused.com by August 30th to confirm your interest and availability.

Newsletter Authors: If you have an idea for an upcoming newsletter article, be sure to send an email to Susan Wolfe at susan.wolfe@susanwolfeandassociates.net

Deadlines are August 31 and November 30.

Thank you!

"Whoever undertakes to set himself up as a judge of Truth and Knowledge is shipwrecked by the laughter of the gods."
Albert Einstein

"Murphy's Law will go into effect at the beginning of an evaluation."
Edward A. Murphy



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

Jean Eells: E Resources Group

“The IC TIG on-line presence is a lifeline to someone like me who is otherwise fairly isolated!”



Jean C. Eells
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1. Please describe your independent consulting practice (e.g., are you a sole proprietor, is this 100% what you do or on the side from another job, what is the primary and secondary focus, do you collaborate or subcontract, etc.)

I operate now as a sole proprietor and I hire subcontractors as needed for their skills or ability to carry part of the load. I picked up an evaluation specialty in 2002 and although it has never represented 100% of my work, having an evaluative “eye” means it is expressed throughout my projects. From 8-14 projects at any given time are on my white board list in my home office. Rural Iowa has really good internet service coverage and I really enjoy the short commute from the coffee pot to the computer in the morning. I’ve worked in education, environment, energy, and evaluation for 30 years and the mix of facilitation, curriculum development, interpretive planning, and collaboration suits me just fine.

2. What is your disciplinary background?

I have a science undergrad degree and education degrees. All of my professional work has been in informal education in natural resource topics and the best home for my doctoral

work was in Agricultural Education.

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

I have operated as an independent consultant since 1997, using E Resources Group as a business name since 1999 with a business partner in the corporation until she retired in 2007. We had always operated somewhat independently within our interest areas but had many projects in common – it was a great relationship and our dissolution of the corporation was very amicable, (which is not always true of dissolved business partnerships).

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

I have a strong qualitative background and I’ve done enough quantitative work to be confident in what I take on in projects. Many of the groups I work with have not had evaluation “done to them” for years unlike some disciplines, and they may have limited understanding of their clients’ range of experiences. I often find they have questions that qualitative methods help them begin to understand. I also find

qualitative work incredibly fast and efficient now after many years and I can offer it cost-effectively.

5. What was your favorite evaluation experience?

Years ago I’d helped a friend design an after-event survey form and after a few years she came back for an upgrade due to programmatic changes. She had made such excellent use of the data she’d been gathering that it was like working with a star pupil. Every evaluator should get to see at least one client shine and thrive as a result of evaluation work.

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

I took on an evaluation of a project that was in trouble that was not in my disciplinary area and I walked into a nest of workers who were very hostile to evaluation and were very uncooperative. I’m not sure how to have prevented that other than hoping not to be so “hungry” for business again to take on something with so many land mines. Although I stand by my report findings, the tools I helped the group develop that they refused to test and use were really wasted.

7. Have you had any comical experiences? Describe them.

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Pricing Your Services

By Gail Vallance Barrington (for more information, look for her new book: *Consulting Start-Up & Management*, due out in October from Sage)

You probably know how much you want to make in a project but how do you go about pricing your services? Pricing depends on several factors and can be unique to each assignment. Here are some price-setting methods:

Daily rate. The *per diem* or hourly rate multiplied by the number of billable hours in your working day is the traditional price-setting method for consultants. However some feel this approach is for only turkeys. Weiss questions this approach and suggests it is both amateurish and self-limiting. Maybe his client base is different from mine but I know that my government clients demand strict accountability. Happily, I always have my time sheets to back up any amount that I bill.

For me, having a daily rate also makes fee calculations easy and billing straightforward. The challenge to this method is coming in as close as you can to the proposed contract amount to make sure that little or no money is left on the table. At the same time, your proposal has to be so accurate that you are not left holding the bag with extra costs to cover out of your own pocket.

For these reasons, I always provide milestone deliverables in the form of monthly status reports and these accompany my monthly invoices. This way I get paid regularly and the client is updated about both the project budget and progress toward project completion.

Fixed fee. Many consultants believe that they make more

profit charging a fixed fee or flat rate. Some collect half their fee up front and half upon completion of the project. This approach benefits the client who can withhold payment until fully satisfied. This could involve significant time while revisions occur. You are disadvantaged if the project costs more than originally anticipated. Does this over-run reflect poorly on your planning ability or your management skills? Did events beyond your control cause this unplanned result? Clients are not pleased if there are unexpected additional costs and life can become complicated quite quickly.

On the other hand, if you continually cover the cost gap yourself, you will soon be out of

business. These kinds of dilemmas cause headaches and sleepless nights so I try to avoid them altogether.

Still, many consultants use a fixed fee method all the time. Others tend to charge a flat fee for small engagements such as quick surveys, workshops, or the evaluation design for grant proposals. To protect yourself on fixed fee assignments, prepare a one-page letter agreement, limit the scope of your engagement, or consider using a phased approach. Breaking down an assignment into smaller parts allows you to estimate costs more accurately, limits your financial exposure, and allows you to judge your client's willingness to pay.

To be continued in the Fall 2011 newsletter...stay tuned!

IC TIG Summer Poll Results

Thanks to all ten of the IC TIG eGroup subscribers who took a minute or two to reply to our first "fun" member poll in June.

Please describe your favorite summer pastime. What a variety of activities!

- ◆ Eating fish and chips on the beach

- ◆ Running around in playground sprinklers with the kids
- ◆ Caring for a summer flower garden
- ◆ Hiking in the Colorado Rockies
- ◆ Folk dancing (in the squares of Italy under the moon!)
- ◆ Water sports: kayaking, river rafting, swimming
- ◆ No favorites now that I live in sunny Southern California

But the "winner" is →→

"Summer pastime? The winter holidays! Summer is our busiest time of the year observing teacher professional development, collecting and analyzing data, and reporting to funders. We can't wait until school starts again!"

Eells Interview—continued

It wasn't funny at the time, and it wasn't an evaluation contract, but it's funny now to think about having a contract payment from an organization delayed because of an embezzlement investigation of the bookkeeper. It is such high drama for rural Iowa it makes me laugh to have ever had any part in something so

strange to my world.

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

My husband and I love to dance for our exercise program – which means we dance to big band sounds on Sunday nights, and travel to polkafests or barn dances for our fitness program.

Think about it – would you

rather use a treadmill or dance?!

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

Working with a small population in a rural area requires you to effectively bridge diverse ideological groups to stay in business. Without compromising my own personal ethics, I believe that the only way I can

survive as a viable consultant is to be as nonjudgmental in my approach to diverse groups as possible. Finding a point of common ground makes it possible to work in situations where people may have a long memory for things you say and do. The IC TIG on-line presence is a lifeline to someone like me who is otherwise fairly isolated!

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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

[Independent Consultants TIG website](#)

IC TIG Conference Program Update

Registration has opened, the hotels are taking reservations, and the program has been posted! Before we know it, the AEA conference will be here. The Independent Consulting TIG has an exciting program lined up; we will share more details in the next newsletter. The following sessions are listed in the program as sponsored by the IC TIG:

- ♦ *The Business of Evaluation: Achieving Growth in Small and Medium Sized Companies*
- ♦ *Issues in Measurement of Adoption and Implementation*
- ♦ *Growing Your Business in the Current Economic Climate*
- ♦ *I'm With the Brand: A Behind the Scenes Look at the Three T's of Creating an Effective Internet Presence*

- ♦ *Responding to Insufficient RFPs*
- ♦ *From a Distance: Conducting Successful Long-Distance Evaluations*
- ♦ *Meet the Pros: Intermediate Consulting Skill Building Self-Help Fair*
- ♦ *Living Your Values: Ethical Dilemmas in the Field and How to Deal With Them*
- ♦ *Wrestling with Clients to Strengthen Our Evaluation Practice*
- ♦ *Enhancing the Quality of Evaluation Design and Data Collection Tools Through Peer Review*
- ♦ *Starting and Succeeding as an Independent Consultant*

Mark your calendars: the Independent Consulting TIG Business Meeting will be on Thursday, November 3rd from 6:10 to 7:00 p.m.

Please plan to attend and join TIG members for dinner afterward at a restaurant TBD. If anyone has recommendations for a good place to hold the IC TIG Dinner, please send your suggestion to Susan Wolfe at susan.wolfe@susanwolfeandassociates.net

