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Fall 2013

Independent Consulting TIG Newsletter

An Invitation and a Challenge

by Randi Nelson 2013 TIG Chair

Writing my last IC TIG newsletter article has been challenging. The first part is easy: **Please attend the dinner after the IC TIG business meeting.**

When: 8pm, Thursday, October 17
Where: The Grill from Ipanema, Adams Morgan
How (much)**:** under $29/person [not including alcohol or 18% gratuity]

Help us plan by responding to the invitation at http://www.evite.com/l/rvpBZwKTtl

Check the listserv and Facebook page for updates:
Facebook site: https://www.facebook.com/AEA.IC.TIG
Listserv: http://comm.eval.org/EVAL/Discussions/PostaMessage

The second part of writing this article was more difficult since I felt I had to come up with a very important topic - which is to say, I had writer's block. Then I was inspired by my "unbook" club's discussion of personal assets. We were asked to describe five of our characteristics that add value to our work or personal life. We had difficulty with this task, not because we lack value-adding characteristics. Rather, we were embarrassed to identify and then discuss these things with each other. I think many independent evaluators have a similar difficulty. We are so immersed in what we do that we forget we have unique and valuable skills and knowledge that others lack. Or we are uncomfortable with self-promotion. So, my parting challenge to you is to list the assets that bring value to your work. Here is a suggestion to get you started: 1) think about what you are like at your best; or 2) think about characteristics you have that when taken to extremes can be really annoying. For example, I chose "being enthusiastic" because my mother says I go about things "like I am killing snakes".

The second challenge is to devise a plan - yes, write it down - that will allow you to let others know about these assets. I know, it sounds like a marketing plan but go ahead and do it anyway. To be successful as an evaluation entrepreneur is challenging because we must be aware of our strengths AND comfortable with telling others. Still struggling with your list? Ask your trusted colleagues, clients, friends, and family to help. You will be pleasantly surprised at how others see you.

I wish you well in this endeavor and success in your evaluation consulting. It has been an honor to serve as Chair of the Independent Evaluators TIG this year. I look forward to seeing many of you at the AEA conference.

Best wishes,

Randi Nelson

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Next newsletter deadline:

November 30, 2013

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

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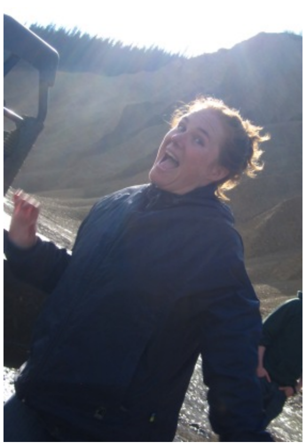
Meet an IC TIG Member!

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

Laura Keene, M.P.H.

"I stumbled into the world of evaluation my final year of college thanks to a last minute internship... I fell in love with the field immediately and have been hooked ever since."



1. Please describe your independent consulting practice.
I have a one-woman shop called Keene Insights based in sunny Los Angeles, California. What I like to say is: I help people find their inner data geek, harness the power of data, and have a greater impact on the communities they serve. In other words, I work with organizations, primarily smaller nonprofits, to conduct evaluations and I provide training and planning support around data, data collection, and evaluation. As a result of a strange twist of fate many years ago, I'm also a database developer, building desktop and web-based systems for nonprofits, NGOs, government agencies, and my fellow evaluators.

2. What is your disciplinary background?
I have a BA in Psychology from UC Berkeley and a Master of Public Health (MPH) from Columbia University.

3. How long have you been evaluating, and how long have you been an independent consultant?
I've been an evaluator for about ten years now, working in a variety of contexts along the way. I stumbled into the world of evaluation my final year of college thanks to a last minute internship (I suddenly realized I was graduating and might need some experience beyond waitress, cashier, barista, and stock-girl). I fell in love with the field immediately and have been hooked ever since. For a variety of reasons (probably similar to your own), I jumped ship from my 9 to 5 in early 2012 to start Keene Insights. So far so good!

4. Are you primarily qualitative, primarily quantitative, mixed methods? Which do you prefer?
I've always done some of both. Qualitative methods tend to turn up the most fascinating results but analyzing that data is quite the slog.

5. What was your favorite evaluation experience?
A number of years ago I was working with an organization to evaluate a Juvenile Drug Court (JDC). This program was a last resort for adolescents with repeated drug-related offenses. It was either JDC, a very intensive case management and counseling program, or jail. It's definitely my favorite project to-date. The staff was so amazingly committed to the kids and they were invested in the evaluation, wanting to learn and improve.

6. What type of experience have you had that was less than ideal?
I struggle with projects where, despite all my best efforts, I can't get the client invested in the process and the results. I'm guessing you've had of few of those projects too, the ones where you're pretty sure the final report is going to end up propping up an uneven desk somewhere.

7. Have you had any comical experiences? Describe them.
When it comes to database development, I have a bad habit of getting deep into the work and forgetting to move, feed myself, or even take a bathroom break for many, many hours. At one job, my co-workers would wander by every couple hours and make sure I got up and said hello to the world. The "Harass Laura When She's Deep into a Database Gig" job now belongs to my partner (he's a film and TV composer and works at home as well).

8. What do you like to do when you're not evaluating?
I try to take advantage of all of the sunny days with lots of outdoor "–ings": hiking, biking, jogging, kayaking, etc. I love to travel, anywhere and everywhere. I'm also a book fiend and an avid knitter.

9. Is there anything else you would like for your peers to know about you?
I love meeting other evaluators! Please feel free to e-mail me anytime. If you're in Southern California, we can even meet for coffee. And,

I hope to see many of you at EVAL2013!

TIG Table at AEA 2013

The IC TIG will be hosting a table at the AEA conference October 16-19. The purpose of the table is to grow our membership and to highlight the activities of our TIG. The table is also an opportunity for potential partners to see us and pick up cards, brochures, and promotional materials. We invite all TIG members to look for the table and drop off your materials. You can also contact our Table Coordinator, Sukey Blanc, at sblanc@creative-evaluations.com.

Questions to Ask Yourself Before Responding to an RFP (Part 2)

Susan M. Wolfe
Susan Wolfe and Associates, LLC

Do I have the needed resources – staff, contractual help, equipment, expertise, supplies?
If the project requires purchasing expensive supplies you will never use again, consider passing. If expenses will consume much of the budget, determine whether the cost is worth it.

Is This Project Interesting to Me?
If a time-consuming project doesn't interest you, think twice. Admit it: You do your best work when the job interests you. Committing to uninteresting, time-consuming, and long-term work will take time away from work you really want to do.

Who is My Competition?
Get to know the skills, capacity, and areas of expertise of other evaluators who bid on similar jobs. If you know them, consider asking them if they are applying. If you believe you cannot compete with them, think about whether it is worth the time to complete a proposal. You might ask your competitors if they are interested in collaborating – perhaps you have a skill to offer them.

Are My Proposal Writing Skills Good?
If your proposal is not funded, ask the solicitor for feedback. Maybe you submitted a strong proposal, but someone else was stronger or had more relevant experience. You also might find you need to learn to write stronger proposals.

How Can I Develop These Skills?
The skills to write good proposals develop through experience. Reading a LOT of RFPs is a good way to learn the different skills requested, the formats, questions asked, and resources required. Look for RFPs on federal, state, municipal, and foundation web sites. Study them to see what different organizations require. Assess your skills and experience, and how closely they match what each RFP requires. Developing your writing skills is especially important. Understand how much time and effort evaluation tasks take, and your own strengths and limitations. Keep a log of your current project activities to determine how long it takes to develop new measures, write a report, enter data, analyze the data, and any other tasks you might need to cost out for a proposal.

In Summary

- Apply only for projects that you feel you realistically have a chance at getting.
- Good writing skills go a long way.
- Follow the directions exactly on the proposal – read the requirements carefully and review the rating criteria.
- If you are not well-suited for the project, either pass on it, or find a collaborator with the requisite skills you lack.

IC TIG at AEA 2013

By Michelle Burd,
Burd's Eye View Research & Evaluation

This year's annual AEA conference is October 16-19, 2013 in Washington, DC. Our President Jody Fitzpatrick has asked us to look at the state of "Evaluation Practice in the Early 21st Century," to reflect on who conducts evaluations of which kind of programs and with which methods. What difference does diversity within evaluation itself make for improving programs?

This year the IC TIG is sponsoring 16 presentations. At our business meeting, Thursday at 6:10 PM, Amy Germuth is presenting her paper, "Independent Consultants at the Crossroad: What Independent Consultants Report as Trends and Challenges in Evaluation and Evaluation Consulting," including responses from 140 IC TIG members.

Other presentations are:

Roundtables: "What are the most important ingredients of an undergraduate internship program in a small evaluation consulting business?" Manfred Straehle; "Biting the Hand that Feeds? - Challenges Facing Independent Consultants in the Role of External Evaluator" Shamsah Ebrahim; and "Your Foot's in the Door, Now What? How do consultants manage 'entry'?" Michelle Burd.

Birds of a Feather: "Independent Consultants: The Unique Challenges and Opportunities of Being a One-Person Shop" Mariko Chang and "Who do they think we are? Issues and dilemmas raised by our clients' perceptions of evaluators and evaluation" Loretta Kelley.

Demonstration: "DELIVERING BAD NEWS: How to translate Negative Feedback into Productive Formative Evaluation Feedback" Mary Anne Sydlik and Skill-building Workshop "Hands-on, Real-Time: Evaluators getting and giving constructive feedback on real evaluation problems and approaches" Douglass Moon.

Think Tanks: "Polygamous Evaluations: The joys and challenges of collaborating with multiple evaluators on a single project" Rachel Becker-Klein; "50 First Dates: Managing Subcontractors and Being the Subcontractor You'd Want to Hire" Sheila Arens; "Meet the Pros: Intermediate Consulting Skill-Building Self-help Fair" Robert Hoke; "Managing Client Communications: Developing New Strategies by Learning from Failed Relationship" Gail Barrington; and "Evaluation Live! Maximizing the Evaluation Experience" Melanie Hwalek.

Panels: "Challenges in Evaluation and Strategies to Overcome Them" Mary Styers; "Making it through: the perils of moving from proposal to discussion to contract as an independent consultant" Cheryl Kessler; and "The Business of Evaluation: Transitioning the Ownership and Control of Evaluation Organizations" Richard Hezel.

Pre-conference facilitation workshop by Rita S. Fierro, our former TIG Chair: *Have you ever: held a session with stakeholders and didn't really hear from everyone in the room? Wanted a client to think deeper for a new strategy? Thought things were so complex you wanted to scream? Felt frustrated that power dynamics interfered with meeting results? Group sessions can range from frustrating to rewarding.* Alissa Schwartz and Rita are teaching a workshop, **Introduction to the Art of Hosting: Applying Participatory Leadership And Facilitation Techniques In Evaluation,** to offer tools to help group sessions be productive and fun. http://www.art-intellect-practice.com/

FAQs and What to Do About Them!

by Gail V. Barrington

Question: What is year end and why do I need one?

Answer: Actually, you already have a year end if you pay income tax. If you have a sole proprietorship or are a single-member LLC, your business year end and your personal year end are one and the same. The year end for an incorporated business is also the end of the calendar year unless you opt to change it. If your work is seasonal you may want to change it to a less hectic time of year but consult your tax advisor first. There are tax forms to complete and there can be other financial reporting implications.

Your year end can be a useful benchmark to compare this year with last. Your plans for the coming year will be more focused and more likely to turn into reality--especially if you review them often.

Here are some year-end strategies:

- **Keep your personal and business expenses separate.** A separate business bank account, credit card, and line of credit will keep you organized.
- **Code and date your expenses as they happen.** Keep all your business-related receipts and code them to the appropriate expense category in your operating budget (e.g., office supplies, marketing). Legitimate business expenses can lower your tax burden. Remember to track your non-client-related business mileage as well.
- **Keep all your business records in one place.** Rather than the proverbial shoebox or bottom drawer, a separate set of file folders will do nicely. Save yourself time at the end of the year.
- **Update your accounting program regularly.** Be sure that all your revenues and expenses for the year have been entered.
- **Get your tax documents ready** and meet with your tax advisor. Once you are familiar with the process, you may do your taxes yourself.
- **Review your year-end statements.** See if you accomplished last year's goals. Look for ways to reduce your taxes next year.
- **Plan for the coming year.** What do you want to accomplish? Set three goals—one for desired revenue, one for the type of client or work you want, and one for your professional development.

Gail V. Barrington

For more information on consulting topics see Barrington, G. V. (2012). *Consulting Start-up & Management: A Guide for Evaluators & Applied Researchers.* Los Angeles: SAGE.

- Year End Small Business Checklist
- Year End List

I invite ideas for topics that interest our members. Send any suggestions for future columns to me at gbarrington@barringtonresearchgrp.com.

A New Consultant's Perspective

by Danyell Lewis, Institutional Research Consultants, Ltd.

***Note**: The author of this article is the new employee mentioned in the Summer newsletter's article "My First Employee".*

Independent consulting is a lot like flying—although you have a detailed itinerary, you still arrive two hours early and bring extra snacks—because unexpected delays are a natural part of travelling. At least, that is how I've come to understand consulting as a fresh face in the field. So far it has involved a combination of project management, marketing, and counseling.

Project Management: Organization is critical, so whatever it is, have a method to your madness. At any point in time, we are juggling 12-18 projects. Though overwhelming at first glance, we stay sane by balancing a combination of large- and small-scale ones. We have a system code for each project/client and develop a corresponding timeline. We must also *stay* organized; a lapse in discipline can mean the difference between a new client and missed opportunity.

Effective communication is also necessary for managing projects. Positive, constructive relationships with colleagues and clients can improve work quality and the overall work experience. My supervisor and I have similar values, so we get along well. We communicate openly, on both positive and negative aspects of our performance. Such an environment allows me to be creative and think critically about my work.

Marketing: Spread the word about your organization. Branding may sound a little cliché, but developing a reputation helps attract clients. This includes networking and involvement in professional development activities. I've learned that for small firms like mine, much of our business comes from trusting relationships and recommendations from former clients. *You better believe clients talk*! Make sure they are talking because of your great work. Which brings me to the last point…

Counseling: **Do not overlook your soft skills.** In today's fast-paced, automated-message ridden society, people receive services without being treated like human beings. Being attentive to client needs, involving them throughout the evaluation process, and responding as their plans change can go a long way. Really *listen* to your clients. They will appreciate it, and possibly remember you the next time they need an evaluation.

Final Thoughts: I love consulting because it is so versatile. One day I'm interviewing the stakeholders of a small service-learning program, the next I am drafting reports for an NSF-funded program for STEM students. No two days are the same. So remember: when evaluating—or flying—keep your plans flexible to prevent big headaches later.