

Winter 2014

Independent Consulting TIG Newsletter

Chair's Corner

by Stephen Maack 2014 TIG Chair



It's my last column -- a time for reflection. In 2014 we created a Strategic Plan to guide the through the next three years. That is a first for us and maybe for AEA TIGs. Independent consultants lead the way for AEA.

I love our clarified Mission and Vision. "The mission of the American Evaluation Association (AEA) Independent Consulting Topical Interest Group (IC TIG) is to provide targeted services to its diverse members in ways designed to help them plan for, create, grow, and increase the efficiency and effectiveness of their evaluation consulting businesses." The vision is that "The American Evaluation Association Independent Consulting Topical Interest Group will be an active, supportive, professional community that shares, cooperates and learns from one another throughout the year." Sounds like us.

Achieving the ambitious Strategic Plan goals and objectives will require much active, supportive,

cooperative help from members over the next three years. Deborah Levy, 2015 Chair, Matt Feldmann, Chair-elect, and I are orchestrating a transition to 2015. I lined up committee members to work on Goal 4: "Develop meaningful ways for the TIG to promote the value of small to medium size evaluation consultants and advocate on their behalf."--and also on Goal 6--"Better promote membership benefits among diverse and international AEA members." See the whole Strategic Plan on page 3 and then contact Deborah Levy (debklevy@successlinks.biz) or Matt Feldmann (gosheneducation@gmail.com) about what YOU want to work on.

In closing I simply want to thank all who have helped make 2014 a successful year for the TIG: Deb Levy, Randi Nelson, Michelle Burd, Colonie Gray, Loretta Kelley, James Griffith, Elena Harman, Laura Keene, Matt Feldmann, Cindy Banyai, Mary Nash, Jessica Vallejo, Gail Barrington, Gary Ciurczak, Don E. Dailey, Francesca Wright, Shamsah Ebrahim, Rita S. Fierro, Arlene Hopkins, and Paula F. Pipes. Kudos to all.

Inside:

Meet Matt Feldmann	2
IC TIG Strategic Plan	3
Half a Dirty Dozen: Six Pitfalls to Avoid When Writing Evaluation Reports, Part 3	4
IC TIG Business Meeting	4 minutes

Next newsletter deadline:

February 28, 2015

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

2015 INDEPENDENT CONSULTING TIG LEADERSHIP

Chairs

Deb Levy, Chair

debklevy@successlinks.biz

Matt Feldmann, Chair-Elect

gosheneducation@gmail.com

Stephen Maack, Outgoing Chair

consultant@reapchange.com

Program Co-Chairs

Colonie Gray

cgray@qgresearchconsultants.com

Elena Harman

elena.harman@gmail.com

Media Committee Co-Chairs

Laura Keene, Social Media

laura@keene-insights.com

Mary Nash, Web Coordinator

msnash3@gmail.com

Newsletter Editors

Loretta Kelley, Content

lkelly@kpacm.org

James Griffith, Layout

james.griffith@cgu.edu

Facebook Page Content Creators

Trina Willard

trina@knowledgeadvisorygroup.com

Tom Clark

tom@taconsulting.net

Frances Burden

fburden@adhocanalytics.com

Tosca Bruno-van Vijfeijken

tbruno@maxwell.syr.edu

Matt Von Hendy

info@greenheroninfo.com

Meet Matt Feldmann

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



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.).

My practice, Goshen Education Consulting, Inc., is a regionally based niche educational research and evaluation practice. The practice focuses primarily on Southwestern Illinois, a community that has >\$2 billion in annual educational expenditures. While I collaborate and subcontract with others, I hope to grow the practice beyond just me, the sole employee. My view is that there are several under-served educational regional communities that need local evaluation. In my area people go out of town or to a regional university for evaluation, and generally are disappointed with the services provided. If my experiment in Southwestern Illinois works, I think there is potential to generate additional practices in nearby regional communities in future years.

2. What is your disciplinary background?

Simply put, educational research, but it really isn't that simple. My practice thrives when I work within my strengths that have been developed from a handful of background experiences. (1) I worked as a senior consultant with Arthur Andersen where I learned how to be a consultant. (2) I completed a Ph.D. in Education (focus Higher Education) where I learned how to read, research, and complete large projects. (3) While working on the Ph.D. I had a graduate assistantship at a research institute where I learned about educational evaluation. (4) Following my Ph.D. I was a director of institutional research where I honed my research and reporting capacities.

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

I completed my first educational research project in 1994, but my skills weren't really developed until I started educational evaluation studies in 2002. My practice got

started on a lark in 2007, when I decided to help some colleagues with a local evaluation and they kept finding more work for me. I went independent (aka quit my day job) at the end of 2010.

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

Yes. All of the above. I primarily do small projects and must be flexible.

5. What was your favorite evaluation experience?

I enjoy all of my evaluation experiences, particularly when I get to be involved with teacher professional development. I love going on field trips with the teachers. I have been in a coal mine, to a national laboratory, on tours at several companies, on a Lock & Dam in the Mississippi River, to a water sewage treatment facility, and to a coal fired electric plant (on the hottest day of the year).

I am slowly completing a marathon in every U.S. state. I started this in 2000 and currently have completed a marathon in 27 states and intend to have this completed in 2021 when I turn 50.

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

Less than ideal experiences include those when I haven't effectively communicated with a project director and we have surprises. I don't like surprises, unless they are comical. [See the next question.]

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

I attended my first TIG dinner in 2011 in Anaheim, where I mistakenly left my laptop and case at the restaurant. Panic ensued. I took a \$27 cab ride back to the restaurant, but came up empty handed...someone had taken my laptop to return to me...but nobody was exactly sure who. (?!?!). I spent about an hour searching the lobby bar and the conference hotel and heard that it was either Fred Glanz or Mike Herrick. After interrogating Rita Fierro, I went to their rooms, but neither were there. On a whim, I went to the outdoor pool on the fifth floor and there were Fred and Mike waiting for me (as if they knew I would come?) with a very expensive bottle of red wine from Fred's collection. We had a nice evening on the terrace and I learned quite a bit from the two of them about being an independent consultant. First rule, always know where your laptop is.

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

I am slowly completing a marathon in every U.S. state. I started this in 2000 and currently have completed a marathon in 27 states and intend to have this completed in 2021 when I turn 50. I call this the 50-50-50, 50 marathons in 50 states when I am 50.

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

I am very pleased to be selected as the Chair-elect for the IC TIG. The TIG has been very beneficial for me and I intend to give back to the TIG. The strategic plan that was developed in 2014 provides a nice structure for different ways we can improve our community and opportunities to learn from one another. I intend to work on TIG initiatives for 3 years in a chair position (2015 – chair elect, 2016 – chair, 2017 – past chair) with the hopes of developing some very special opportunities for our community.

AEA Independent Consulting TIG Strategic Plan, 2015-2017

Mission

The mission of the American Evaluation Association (AEA) Independent Consulting Topical Interest Group (IC TIG) is to provide targeted services to its diverse members in ways designed to help them plan for, create, grow, and increase the efficiency and effectiveness of their evaluation consulting businesses.

Vision

The American Evaluation Association Independent Consulting Topical Interest Group will be an active, supportive, professional community that shares, cooperates and learns from one another throughout the year.

Goal #1: Increase the IC-TIG's value to its members by providing targeted services by 2017.

Objectives

- 1.a. By October 2016 identify and evaluate current member benefits and develop recommendations for continuing or dropping services.
- 1.b. By October 2016 explore and develop recommendations for productive and sustainable mentoring or peer-to-peer services for members.
- 1.c. Between January 2016 and December 2017 identify and utilize data sources on an ongoing basis to help drive IC TIG decision making.

Goal #2: Provide effective ongoing communication with TIG members each year between 2015 and 2017.

Objectives

- 2.a. Maintain a robust, up-to-date AEA IC-TIG website designed to increase member engagement between 2015 and 2017.
- 2.b. Increase use of the IC TIG eGroup on the AEA website by 25% over 2015 usage by 2017.
- 2.c. Continue a quarterly IC TIG newsletter between 2015 and 2017.
- 2.d. Ensure members remain informed about current services and TIG benefits between 2015 and 2017.
- 2.e. Analyze best uses of social media to communicate with our members and others between 2015 and 2017.

Goal #3: Develop and provide relevant, accessible opportunities that enhance IC TIG members' business success.

Objectives

- 3.a. Expand educational opportunities to include more information about hard and soft business skills by 2017.
- 3.b. Offer multiple educational and information exchange platforms to current members throughout the year by 2017.

- 3.c. Develop and communicate general market relevant information ("business intelligence") to IC TIG members to help in their business development by 2017.
- 3.d. Educate and train TIG members in availability and use of a variety of business technology (by 2017).
- 3.e. Explore how the TIG can facilitate collaboration among members on business strategies and ventures by 2017.
- 3.f. Explore opportunities to obtain cost savings for IC TIG members.

Goal #4: Develop meaningful ways for the TIG to promote the value of small to medium size evaluation consultants and advocate on their behalf.

Objectives

- 4.a. Between 2015 and 2017 communicate with consumers of evaluation services about alternatives to contracting in addition to RFPs.
- 4.b. Expand information sharing between the IC-TIG and other TIGs to promote mutually beneficial business and evaluation practices between 2015 and 2017.
- 4.c. Develop and provide information to potential clients about what is involved in doing evaluations, evaluation costs, and alternative ways to fund evaluations between 2015 and 2017.
- 4.d. Repeat the deployment and analysis of the decennial Independent Consultant Topical Interest Group Survey by December 2016 and publish results.

Goal #5: Determine potential need for TIG funding beyond AEA subsidy for annual meeting.

Objective

- 5.a. Review current and future need for TIG funding above and beyond the current \$300 to \$600 AEA subsidy used for the annual TIG dinner.

Goal #6: Better promote IC TIG membership benefits among diverse and international AEA members.

Objectives

- 6.a. By March 2015 contact AEA and the International and Cross-cultural TIG and Multiethnic Issues in Evaluation for information about benefits they are providing to diverse and international members.
- 6.b. Determine current or new services that the IC TIG can provide to diverse and international AEA members.
- 6.d. As appropriate and needed, develop or revise marketing approaches and communications about AEA IC TIG benefits in relation to attracting diverse and international members.

Independent Consulting TIG Newsletter

Half a Dirty Dozen: Six Pitfalls to Avoid When Writing Evaluation Reports, Part 3

(In the first two installments, we covered acronyms, ungrounded recommendations, imprecise words, and overused words. Here we examine the last two pitfalls and offer some helpful resources.)

Super-sized Summaries. The fifth pitfall is the temptation to include more than necessary in the executive summary. The summary should be just that, a brief piece that sums up the study. It should include a succinct account of major activities for the period evaluated, perhaps in bulleted form; findings and recommendations—and even those may be stated briefly, leaving discussion to the body of the report. I try to keep summaries to no more than two pages, so that clients can copy them on one two-sided sheet, making them easy to distribute to audiences who need the essence of the report, but not the full discussion.

Perambulating Prose. The text of an evaluation report does not have to be sketchy or dry, but neither should it be a meander through the program. It needs to be carefully organized, direct, and thorough. Even if your work is qualitative, including a hefty

Billie Birnie
Birnie and Associates

dose of “thick description,” it should be guided by organizational strategies that manifest clear thinking. The most basic of those are chronological, spatial, and topical; others, such as question-answer and comparison-contrast, also lend themselves to reporting evaluation research. Those patterns of organization are indispensable tools in an evaluator’s toolkit.

Resources. Two books that I couldn’t do without are Strunk and White’s *Elements of Style* (NY: Penguin Press, 2005) and Virginia Tufte’s *Artful Sentences: Syntax as Style* (Cheshire, CT: Graphics Press, 2006). The first, an updated version of the classic writer’s handbook, contains six sections, all useful to evaluators: Elementary Rules of Usage, Elementary Principles of Composition, A Few Matters of Form, Words and Expressions Commonly Misused, An Approach to Style, and Spelling. The second contains more than a thousand sentences harvested from the author’s search to identify ways professional writers effectively use the language. A third book that may be helpful is my own, *A Guide to Organizational Strategies*, which will be out later in 2014 or early 2015 from Rowman and Littlefield.



IC TIG 2014 Business Meeting

Thursday, October 16, 2014 (6:20 to 7:00 p.m.)

2014 IC TIG Chair Stephen Maack opened the meeting and thanked the 2014 TIG leaders and those who served on the Strategic Planning committee.

Stephen Maack gave a PowerPoint presentation that explained the process used to create the IC TIG Strategic Plan for 2015 to 2017 and presented the plan. Those at the meeting were invited to write down a comment or a question on Post-it® notes that had been handed out as they entered.

TIG leaders then took turns responding to questions on the Post-it® notes and those raised from the floor. Several people made supportive comments about the Strategic Plan. Most of the written comments were supportive. Some comments had already been considered during the planning process, or were for specific actions rather than goals or objectives statements. A few in the audience voiced critiques about the plan not having measurable

goals and objectives, or strong enough wording, or made verbal suggestions for additions/changes. The comments and suggestions were recorded and will be taken into consideration for possible future changes to the Strategic Plan after 2015 and for implementation as activities to meet one or the other goals and objectives in the Plan. Stephen Maack promised to have the committee develop a Mission statement from the Plan contents and to determine a Vision statement for the TIG.

Incoming 2015 TIG Chair Deb Levy briefly described her action plans to implement the Strategic Plan, called for assistance, and passed around a sign-up sheet.

Stephen Maack facilitated elections of 2015 officers (see list on page 1).

Elena Harman announced directions about how to get to the annual IC TIG dinner.