Two days ago LinkedIn informed me it was the eighth anniversary of starting my consulting practice SuccessLinks, LLC. I couldn’t believe it—time really does fly! Aside from time passing so quickly, mostly couldn’t believe it because only an hour before I had accepted a full-time “real” position with Peace Corps headquarters in Washington, DC.

Yes, you heard that correctly. Your Independent Consulting TIG Chair is soon not going to be an independent consultant, at least not now and not full-time. What drove me to make this life-changing decision you might ask?

During the AEA conference last October, I was interested more in people who worked for one organization and had a concrete focus. My consulting practice has always fallen under the generalist category: I evaluate mentoring programs, food policy coalitions, museum education programs, and micro-finance loan programs. For seven years I loved the variety and everything that came with it, but for some reason this past year I haven’t loved it as much. After the conference I started looking for people who had left consulting and were working for someone else. By the third conversation, I was ready to begin a job search. I thought the search had to be for a position worth changing my whole life around, and my family’s. We all have had it pretty cushy the last eight years! I applied for five positions, had three first interviews, two second interviews, and finally I felt that one was a great match and, fortunately, they chose me too.

I begin my new position in mid-June. Although I won’t have the same independent status as before, I will remain as chair of the TIG through the end of my term. We have made a lot of progress on the implementation of the strategic plan and I would hate to see even a small pause in the process. Each goal of the plan has a committee leader and committee who have been working hard to improve the TIG. By the next conference, we will have more formal mentoring and peer-review processes, as well as other new ideas and systems, in place.

Lastly, I want to thank our program chairs Elena Harman and Calonie Gray for their great work heading up the proposal review process and everyone who volunteered to review proposals. We had a record number of submissions this year and I look forward to seeing the final conference agenda when it is released.

Have a great start to summer!

Do you have some great resources? Materials from an inspiring workshop you attended? Slides from a session you conducted at a past conference? An amazing toolkit you used? A helpful article you found as you wandered the internet one procrastination-filled afternoon? Please share! The IC TIG has its very own eLibrary where you can post all kinds of documents for your colleagues to peruse. Plus, we just added instructions to make it even easier to contribute.

We have lots to learn from each other so don’t forget to connect and share with your fellow IC TIG members in other ways as well. You can engage in lively discussions about evaluation topics and let your colleagues know about opportunities and events by participating in our eGroup. We’ve worked out the glitches and instructions have been added here too, so if you’ve had trouble accessing the eGroup in the past, please try again! Make sure to also check out our Facebook page, or maybe even make a good old-fashioned phone call.
Meet Becca Carsel

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

1. Please describe your independent consulting practice.

I live in a rural area with a very small population, so I tend to wear many hats. For example, at the moment, I am just finishing a contract evaluating multiple projects for our County Behavioral Health Department and will start another contract for new projects by the end of the year. I am currently the evaluator for a community foundation grant and am also writing a grant, carrying out a multi-year contract as a health access trainer, advising family resource centers on strategies for data collection and dissemination, and conducting needs assessments for a regional hospital and a non-profit.

I am a sole proprietor; I sometimes collaborate and occasionally sub-contract, though so far my evaluation work has almost always been independent. I’m always looking for projects that I can work on with others, since I learn more and have more fun this way.

The most difficult part of my job is keeping track of all my projects and switching gears quickly. The benefit, though, is that my projects in different arenas end up informing each other and I am able to make connections and share insights with clients that I wouldn’t have if I didn’t engage in cross-sector work.

2. What is your disciplinary background?

I have a Master’s in Educational Administration that led to a planning position which included a lot of evaluation work. My experiences running programs, writing grants, and working within, and in partnership with, government and non-profit agencies have caused me to be a vocal advocate of utilization-focused evaluation. I have worked in the education and social services sectors, and more recently in health.

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

I started evaluation work 18 years ago while working for a regional government agency in Minnesota. When I moved to California two years later, I began working as an independent consultant. For a long time I focused more on grant writing, with evaluation work comprising a much smaller part of my business, partly because evaluation work is much harder to find where I live. But a few years ago I decided I wanted to work more as an evaluator and started seeking out opportunities. Amazingly, this led to much more work in the field.

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

I definitely prefer mixed methods. I work with local organizations and try to help them see how the evaluation process can help them to strengthen their programs and document their successes and challenges. I see again and again that both qualitative and quantitative methods are needed to give people, both within and outside the organization, a complete understanding of the effect of a program for its clients.

5. What was your favorite evaluation experience?

Actually, attending my first AEA conference. Living in a rural area, I don’t often get to spend time with evaluators. Walking into a hotel with over 2,000 evaluators felt incredible! My first conference was in 2011, in Anaheim, and Leonard Pitts Jr. gave an amazing keynote speech. He talked about having to figure out what evaluators were before he came to the conference, and that he realized we were his tribe. And that’s how the whole conference feels, like I’m finally with my tribe.

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

Taking on an evaluation of eight projects where all of them were already underway and two were ending. The funding agency staff had helped them to set up their evaluation tools, but they lacked evaluation plans and logic models and the ones that were ending had collected very little data. I spent a lot of time working with some projects to come up with ways to assess their outcomes retrospectively or quickly. With others, I was left analyzing data that was not always valuable.

I’m always looking for projects that I can work on with others, since I learn more and have more fun this way.

I hadn’t appreciated how much easier evaluation was when I was involved from the planning stages. I also didn’t fully comprehend what it would mean to write eight reports all at once at the end of the contract period! That’s an experience I won’t repeat.

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

Getting lost on a high school campus… I had only visited the site once before and I was so certain I was going the right way until an Assistant Principal drove by on a golf cart, recognized me,
Productive Client Relationships – by Geri Peak, Two Gems Consulting Services

Last year, Melanie Hwalek and I participated in a panel, organized by Matthew Feldmann, on Productive Evaluator/Client Relationships, which grew out of a TIG discussion about clients demanding exclusivity from their evaluator. I think such expectations come from the atmosphere of competition fostered by the funding environment. Norms like setting up non-compete agreements with programmatic partners make clients believe their potential evaluator is a proprietary component of their program design. I believe working with multiple grantees offers great benefits. Upon reflection: these three areas summarize the benefits, based on feedback from our 21st Century Community Learning Center (21stCCLC) clients as well as past initiatives and nearly three decades of service.

1. Clients benefit from specific expertise, where evaluators know the ins and outs of a program. Clients perceived this expertise to be the most appealing aspect of sharing our services: “They are aware of what others are doing. This helps with data processes and just with the overall experience and knowledge base. They also are familiar with challenges that 21st CCLCs encounter and able to help us navigate issues that occur.”

2. Shared tools and systems allow us to maximize the thin funds available. As you all know, the 5-10% of program funds fueling such evaluations deeply undercuts our true costs for time invested. Sharing existing tools saves time and money. It improves quality and allows for innovation. We can customize or port systems whole cloth. For example, all of our sites have adopted our original framework and tool for annual site visits. It has matured enough to be easily used by short-term team members, allowing us to reduce costs while maintaining quality. We’ve used youth development experts, educators, and, this year, trained youth evaluators to conduct the site evaluations, providing additional value to a repetitive process.

3. Organizing and client voice: Most importantly, we can advocate for better evaluation practices and requirements. Working across clients in one initiative allows us to spot weaknesses in protocols, redundancies, missed opportunities and pass those on to program officers. Sometimes we have more freedom to critique initiative-wide plans and present solutions. We can even inspire initiative-wide change through our insights. Bringing clients together can help clients avoid isolation and form deeper cross-program relationships. And sometimes, together, they can help reshape initiatives to focus more on root causes.

Free Evaluation Plan Writing

In May, Bernadette Wright posted the following question to the IC TIG eGroup, “For those of you who provide unpaid evaluation plan writing for clients’ grant proposals, does your written agreement with the client say what will happen if they end up winning the grant but using another evaluator instead of you?” This perennial question appears frequently, so I thought I would summarize our current common understanding. There seem to be three lines of thinking on evaluation plan proposal development.

1. Charge for evaluation plan proposal development. You are dedicating precious time to this proposal work. Grant writers charge for their time…why shouldn’t grant evaluation section writers? From this perspective you separate the evaluation plan development work from the actual work on the job. This approach is probably most appropriate when your area (geographic or content) is saturated with competing evaluators, the evaluation work is generic, and you have not developed a relationship with the client.

2. Develop the plan for free, with stipulations. Your time is valuable, but the client may not have evaluation plan funding. It is reasonable for you to offer free evaluation plan development with the potential prospect of getting some work. You protect yourself by asking the client to sign a job arrangement letter for the evaluation plan development that specifies that they pay you some amount for your time in evaluation plan development if they choose another evaluator after the project is funded, or if they choose not to submit the proposal. This is appropriate when you have not developed a relationship with the client and when there is competition.

3. Develop the plan for free and trust your clients. It can be awkward to ask your clients to sign an agreement...regardless of how appropriate that is. Often a client would not sign a document that pays you if they choose not to submit. Note that this is only appropriate if you have an existing trusting relationship with your client, you have unique/in demand services, and you have a good reputation in your community or content area.

Your choice of the alternatives comes down to three things: trust, competition, and the uniqueness of your services. Regardless of your approach, recognize that if you are contributing an evaluation plan with the hope of receiving work, it is a planned investment of your time. Not all investments pay off.

Matt Feldmann, Goshen Education Consulting, Inc.
Question: Should I Worry About Data Security?

Answer: The answer is, “Yes, absolutely!” As consultants, we collect information and produce knowledge for our clients, but do we spend enough attention protecting these treasured resources? If your server crashes or your laptop disappears, what will you do? Magical thinking is not good enough.

Last month my friend had his desktop and server stolen. With no back-up system in place, he is now trying recreate his entire business. It’s exhausting, expensive, and prone to error, but a cyber attack could be even worse. Do you want to see your client’s confidential data in the public domain?

Happily, a little planning can go a long way to improve your data security:

1. Protect your business
   - Decide which streams of data are confidential or critical to your business. Keep them on separate drives so they are easy to copy and store elsewhere.
   - Develop a disaster recovery plan. Where will you go for the information you need to restart your business if disaster strikes?
   - Hire IT support on an hourly basis to get to know your business systems. Then if a critical incident arises, they will be able to help you.

2. Protect your tools
   - Install protective software on all your devices. It’s cheap and updates happen automatically. Don’t rely on the software that comes with a device; everyone else has the same thing.

3. Protect your data
   - Create and automate a daily back-up system.
   - Test it once a month to make sure it still works.
   - Store data both on and off site. Cloud storage is a good option but also keep a physical copy away from the office.
   - If other people use your devices, limit data access on a “need to know” basis.
   - Don’t use unsecured wi-fi for client information.
   - Consider encryption features.

Taking one step at a time, protect your data and your business. You’ll sleep easier.

Gail V. Barrington

For more information on data protection:


Meet Becca Carsel (continued)

and offered me a ride in the other direction, across the campus to where I had parked.

8. What do you like to do when you’re not evaluating?
I love to walk with my husband and our dog on the beach, and we’re slowly working on some big house and yard projects. With a 14-year-old daughter, I spend a lot of time in my mom role. She loves baking and is learning to decorate cakes, so there is a lot of dish washing and emergency driving to the grocery store. When I’m alone, I adore reading a good mystery book.

9. Is there anything else you would like for your peers to know about you?
I love working with people who are curious and interested in learning. I have been lucky to work with the staff of many organizations, almost all of whom have had these attributes. Their willingness to grow and change their programs in response to evaluation findings allows me to contribute to the success of their programs. I feel so fortunate to work in this field.