In Back to the Future: Part II, which came out in 1989, the characters Marty McFly and Doc Brown travelled to the future, to the year 2015. The movie portrayed 2015 as a time with 3D films, miraculous anti-aging serums, video calling, and hovercraft/flying cars. Although some of these actually exist now, we unfortunately still sit in traffic on the ground and don’t have our own flying vehicles. Maybe in the next 25 years...What is hard for me to believe is that we are actually here- the year 2015. It’s a very exciting year to be the TIG Chair!

In 2014, we concluded our strategic planning process led by former Chair Stephen Maack (who did an amazing job—kudos Stephen!). Now, in the New Year, we have begun to implement the plan. What I appreciate most about this process is the opportunity to work with TIG members who I have never met. For the implementation of the plan, we have several members who were not involved in the planning process and have stepped up either to lead one of the Goals or help out in a committee led by the Goal leaders. I would like to thank each person who has taken on a strategic planning implementation leadership role: Mary Nash and Michelle Burd who are leading the implementation of Goal # 2: Provide effective ongoing communication with TIG members each year between 2015-2015; Eric Graig for leading Goal # 4: Develop meaningful ways for the TIG to promote the value of small to medium size evaluation consultants and advocate on their behalf; Matt Feldmann for leading Goal #5: Determine potential need for TIG funding beyond the subsidy of the annual meeting; and Stephen Maack for leading Goal 6: Better promote IC TIG membership benefits among diverse and international AEA members. If you have not volunteered to help out one of these leaders and would like to do so, please email me (debklevy@successlinks.biz) and I will connect you to the right person. We have committees formed for each goal (except for #3 which will start in 2016) but the more people we have helping, the better.

Happy New Year everyone and I look forward to seeing where our strategic plan implementation leads us!

**Represent!**
Submit an ICT Proposal for Eval 2015!

Last month, AEA sent out the proposal submission information for the annual conference in Chicago. Our TIG would like to increase our submissions and the number of sessions we have on the schedule. Please do not hesitate to submit a proposal or even to reach out to colleagues via the listserv to put panels, round tables, etc. together. Sometimes presenting an idea to the listserv ends in a standing room only session. We have one of the largest TIGs; therefore we should have a proportional number of conference sessions. Information for the conference and submissions can be found at http://www.eval.org/p/cm/lid/fid=311. Let’s make this our year on the conference schedule! The deadline for EVAL2015 proposal submissions is March 16th!

Next newsletter deadline: May 31, 2015

Please send questions, submissions, or suggestions to Loretta Kelley at L.Kelley@kpacm.org
Meet Calonie Gray

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 am co-founder of QQ Research Consultants, an independent research and evaluation firm based in Downtown Miami. Yes; people actually do forgo the beaches in Miami and work sometimes! Our firm provides a vast array of services including community needs assessments, program evaluation, quantitative and qualitative data analyses, survey and instrument development, and programmatic monitoring. We are excitedly entering our fifth year of operations. Our clients include primarily school districts, governmental entities, community-and faith-based organizations, and foundations.

2. What is your disciplinary background?
I am a Developmental Psychologist who cross-trained in epidemiology and biostatistics because of my interest in adolescent substance abuse research. I’m also passionate about understanding what makes the cog in the wheel turn, so a career in social science research is a natural fit.

3. How long have you been evaluating, and how long have you been an independent consultant?
My first official independent consulting gig was in 2010, and it marked the beginning of our consulting firm. My business partner and I did not realize that there was a market for this sort of business. Who would think that the old adage “Do what you love and never work another day in your life” could potentially ring true? We started as a part-time team of two and have grown to a team of about 15 individuals.

4. Are you primarily qualitative, primarily quantitative, mixed methods? Which do you prefer?
While I am a stats geek who adores attending workshops on advanced statistics, I find myself heavily steeped in the use of mixed methods. Numbers are great tools and provide the type of objectivity appreciated by many of my clients’ funders. However, I have incorporated the richness of qualitative data to contextualize the numbers and to capture the essence of the experiences of those individuals served by my clients.

5. What was your favorite evaluation experience?
The beauty of being an Independent Consultant is having some ability to select the sorts of projects you undertake. I have enjoyed most of my projects. However, to date, the evaluation project that brought me the most enjoyment was conducted in the breathtakingly gorgeous, southern, rural region of Haiti. We were able to implement a truly community-participatory approach. We hired and trained a team from the community to assist us with instrument development, data collection, and social outreach. We even solicited community feedback in the interpretation of findings. The final evaluation report read like a book and was well-received by the client, who was actually having their efforts evaluated for the first time. The lessons learned from the project were presented at AEA’s annual conference two years ago and led to the evaluation of multiple projects in the area with a new client.

6. What type of experience have you had that was less than ideal?
I like this question because I find I identify with the experiences shared in many of the previous newsletters. The experience that comes to mind is an evaluation of a program that was being implemented in many different sites. It seemed like a straight-forward task because we were simply asked to collect and analyze data on a few predetermined program outcomes. There was only one problem: each site was implementing its own version of the program. Imagine trying to fit a glove over a duck’s webbed foot...sort of fits, but not quite. Ultimately, we were able to broaden the outcomes and convince the client to standardize programming across sites in future years if program evaluation was of interest.

(Continued on page 3)
EvaluationLive! A Stakeholder Engagement Model – by Melanie Hwalek, SPEC Associates

EvaluationLive! is a stakeholder engagement model that focuses on building stakeholders’ emotional connection to their evaluation experiences. EvaluationLive! asks evaluators to reach beyond the goal of doing good work and strive to create excitement, urgency and a hunger for learning among both evaluators and stakeholders. EvaluationLive! challenges current stakeholder engagement frameworks by hypothesizing that healthy evaluator-client relationships are only one of many factors needed to optimize stakeholder engagement in the evaluation process.

Melanie Hwalek and Mary Williams created EvaluationLive! five years ago to analyze why some evaluation experiences are exciting while others are just “ho-hum.” The model was born from reflections on their sixty years of combined evaluation practice crossed with their knowledge of evaluation literature. Williams retired shortly after EvaluationLive!’s creation and granted Hwalek all rights to further its development.

At AEA’s 2014 Annual Conference, Hwalek discussed how EvaluationLive! aligns with well-established evaluation frameworks including: utilization-focused evaluation, organizational capacity to evaluate, principles of participatory evaluation, essential competencies for program evaluators, and interactive evaluation practice. Hwalek linked elements of EvaluationLive! to evaluation theories and to the broader social sciences. Csikszentmihalyi’s concept of “flow” within the positive psychology literature, for example, is used in EvaluationLive! to define optimal stakeholder engagement. Symonette’s writing about evaluators needing to use “double-sided mirrors” in our work supports the EvaluationLive! concept of evaluator as learner. Symonette’s writing about sustainable trust and relationships being necessary for authentic engagement supports EvaluationLive!’s element of trust within evaluator-client relationships. EvaluationLive! aligns closely with King and Stevahn’s Interactive Evaluation Practice framework, supporting the need for evaluators to “be ready to devote time to what matters” in interpersonal processes. The list of EvaluationLive! evaluator capacities (methodological, measurement and management expertise as well as being seen as credible and having cultural humility) are largely supported by the American Evaluation Association’s Program Evaluation Guidelines.

There is a growing cadre of evaluators building out the EvaluationLive! model. One use of the model, for example, is to diagnose why evaluations go awry. AEA members Natalie De Sole and Dominica McBride presented an EvaluationLive! diagnostic tool during AEA’s 2014 conference in Denver. Many more tools need to be generated, and Hwalek invites you to join in the fun. Get involved with the growing pool of interested evaluators by visiting the EvaluationLive! website (www.evaluationlive.org), tweeting @EvaluationLive and joining the Linked-In discussion group (EvaluationLive!).

Meet Calonie Gray (continued)

7. Have you had any comical experiences? Describe them.
Once, we were using old-school paper-pencil surveys to administer to hundreds of students. It was only after distributing the first half that we realized the second half was blank.

8. What do you like to do when you’re not evaluating?
Evaluation is great, but my first love is traveling and eating the various foods native to the places I visit. My dream profession would include dining in restaurants and being paid for my opinion of the food. I am whole-heartedly a fan of all of the chefs and culinary enthusiasts of the world!

9. Is there anything else you would like for your peers to know about you?
I would like to encourage my fellow IC peers to take on an intern from their local university at least once. We host a cohort of interns annually and find that a large portion of our students interested in IC continue to work with mock datasets and simulations. There’s nothing like working in the messy confounds of the real world to prepare for the real world. The next generation of IC could benefit from us opening our doors to them.
Question: How Should I Handle Travel Expenses?

Answer: Planes, trains and automobiles! Business travel can be fun. See the world and work at the same time but plan ahead:

- Treat your client’s travel budget like your own; be frugal, not profligate. Demonstrate your commitment to saving them money.
- Consider your competition. If they live where you want to work, make concessions on travel costs to produce a more competitive bid. Once you have regular work there, you can discuss expenses.
- Keep receipts for everything. Sort and code them daily.
- Split travel costs between two projects. Everyone will be happy.
- Work on other projects while in transit but don’t bill that time to this project.

Other words to the wise:

Planes—because fares and related fees change daily, footnote your proposal budget saying “based on fares as of (specify date).” Two or three weeks in advance of your trip, check out final costs and prepare a detailed trip budget. Email your client for approval. After booking, if a client requires a change or cancellation, negotiate the change fees.

Automobiles—don’t charge mileage to and from the client’s site. It’s part of doing business. When driving out of town, keep a log. Charge a standard rate using government rates as a benchmark. When renting a car, get a mid-range one. Look for bargains but don’t rent a wreck. Your client needs you to be safe.

Hotels—ask your clients where they stay and use that as a guide. If they have a preferred rate, they can either make the reservation for you or provide a letter as proof that you are their contractor. Or be adventurous. Try a B&B.

Meals—use a government daily rate for meals and incidentals. Stay away from the Top Ten restaurants. Experiment with ethnic cuisines and local favorites instead. Alcohol is never included so have your glass of wine on a separate check.

Other travel expenses—parking, taxis, ferries, toll charges, baggage storage—the list goes on. Not always predictable, these still tend to be reimbursed, no questions asked.

So get packing, have fun, and don’t forget your Air Miles!

Gail V. Barrington


https://thetravelingconsultant.wordpress.com/2010/02/03/consultant-policies-travel-expenses-2/

Staying in Touch

One of the best parts of the American Evaluation Association’s annual conference is a chance for evaluators with common interests to interact with one another and exchange ideas. In other words, for three whole days we get to geek-out together and in-person! It doesn’t have to end there. Through ongoing communications efforts, we can continue to stay connected throughout the year.

Check out the Independent Consulting TIG website. There you’ll find the strategic plan, all of the past newsletters, the names of the executive team members, a list of virtual colleagues who are willing to help you within their areas of expertise, and our eGroup where you can post questions or help answer a colleague’s query.

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

Mary Nash and Laura Keene, Media Committee Co-Chairs

Another good source of communications is the IC TIG Facebook page, which has regular posts about topics of interest to independent evaluation consultants. Plus, you’re always welcome to share your own content or get a conversation started.

As we work on the strategic plan, we will address how to continue to improve upon communications within the TIG. If you’d like to get involved or share your ideas, contact Michelle Burd or Mary Nash, who are heading up the subcommittee working on effective ongoing communication within the TIG.