Happy 30th Anniversary ICTers!

We’re taking a trip back in time to celebrate the Independent Consulting Topical Interest Group (IC TIG) 30th Anniversary.

On a dark and stormy night in an age long past…okay, it’s not THAT old. The TIG does pre-date the American Evaluation Association (AEA). The first meeting was held in 1984 at a joint meeting of the Evaluation Network and the Evaluation Research Society in San Francisco, CA.

These two groups combined to form the AEA two years later. There were three people at the meeting: Katheryn Hecht, Tara Davis Knott, and Deborah Bonnet. Their goal was to provide a forum for independent consultants to network and problem-solve around issues unique to their work. These three pioneers started the TIG at a time when personal computers were just arriving and email was a long way off; networking and sharing was a complicated task.

In 1985, the IC TIG hosted its first two conference sessions, an introductory session titled Striking Out on Your Own and an advanced session called Marketing Evaluation Services. The TIG grew rapidly, reaching 226 members by 1989. It continued to host a few conference sessions each year, convened meetings at the annual conference, and even conducted the first couple member surveys, via snail mail!

Since those quiet beginnings, the TIG has grown into a large, dynamic group. It now boasts 1307 members and hosts between 15 and 20 conference sessions each year. In the early 2000s, with membership at almost 500, the group worked to formalize and expand their efforts further. It developed a mission statement, started an online discussion group on Yahoo (which later became the TIG’s eGroup), and added support services like Peer Review and Virtual Colleagues. In 2006, the group helped to create and compile an issue of New Directions for Evaluation dedicated to independent consulting.

The IC TIG Facebook page was created in 2011 and now, with support from the expanded Media Committee, links and resources are posted almost daily. This year, the TIG has been working hard on a Strategic Plan to help guide efforts in the coming years.

Happy Anniversary IC TIG members! Now, what will the next 30 years bring? Post your thoughts to our eGroup or our IC TIG Facebook page.

Independent Consultants Talk about Practice in Denver

The program of the IC TIG this year offers practical tips, such as how to find RFPs, conduct developmental evaluation, and measure evaluation capacity. Some will discuss relationships between evaluators and clients as well as using humor to navigate those relationships. The IC TIG will lead 11 sessions and co-sponsor two others. Join us and get ideas about ways to change your practice. See you next month in Denver!!

Happy Anniversary IC TIG members! Now, what will the next 30 years bring? Post your thoughts to our eGroup or our IC TIG Facebook page.

Next newsletter deadline: November 30, 2014

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

Pssst! The Chair’s Corner is around the corner on page 2.
Chair's Corner

Today is Sunday, August 31, and tomorrow is Labor Day. That's not always a holiday for independent consultants but a day to catch up on report or proposal writing, a day to hatch new marketing plans, or otherwise try to keep our businesses moving forward while our clients celebrate a long weekend. That is a challenge for some independent contractors – balancing time for ourselves and our families with the demands of running a small business. It is, however, essential to learn to do that or you may find yourself burning out rather quickly.

So today, in addition to church choir this morning, I should be writing the proposal for an Evaluation 101 training seminar (due tomorrow); instead, I am painting the master bedroom while my wife is out of town (she picked the colors – my buddy and I get to do all of the work☺), and writing this piece for the newsletter. I don’t know if that is exactly balance, but I am writing this piece for the newsletter. I don’t know if that is exactly balance, but I can at least keep the faith and keep on consulting!

Yes, there will be photos available at AEA in Denver says the proud grandfather of two!!

The next big thing coming up this year is the AEA conference. Michelle Burd and Calonie Gray spearheaded the effort to solicit proposals and 17 IC TIG members reviewed them. Thank you, Michelle, Calonie, proposers, and reviewers. Thanks also to Elena Harman for great work on short notice locating a restaurant for the annual IC TIG dinner and networking event. (See p. 4 for more information.)

As for me, my major client is wrapping up her multi-year contract; I’ve finished evaluating the summer bridge program for one client; and I still have to write up the results of the evaluation of another client’s STEM Summer Academy. Only the STEM client is continuing right now. So I’m marketing again – one proposal rejected so far but I have an interesting meeting set up on Tuesday with a potential client/collaborator related to a new consulting area that an IC TIG colleague and I are trying to enter. So it goes for the independent consultant. How is your business going? Hope to catch up with you at AEA in Denver. Meanwhile, keep the faith and keep on consulting!

IC TIG Strategic Planning Update:

After five meetings, the Strategic Planning Committee came up with a draft statement of goals and objectives. To gauge member responses to the preliminary plan ideas, we sent an online survey link to the 990 TIG members with valid e-mail addresses who had not opted out of Survey Monkey surveys. We have analyzed the 333 responses (33.6% response rate after an original invitation and three reminders over two weeks in August) we received. Two sub-groups of committee members discussed the responses, which helped us eliminate some objectives, refine one of the goals, and clarify the plan. Thank you to all who responded to the survey—the Likert scale responses and open-ended comments have very much helped us in our decision making. We are currently streamlining the language of the goals and objectives, without losing the gist, and going through the many open-ended comments to see if there are any of the member-proposed goals or objectives that we think it might be worthwhile to add. We will have an advanced version of the strategic plan and its goals and objectives ready for roll-out and consideration during and possibly before the IC TIG business meeting on Thursday, October 16, 2014.

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

In the first installment, we covered acronyms and ungrounded recommendations. Here we examine two more potential problems. The final two will appear in the next newsletter.

Several years ago, I went to a high school to meet with the leadership team to help with strategic planning. Before the meeting, the principal handed me a recent evaluation report and asked me to read it. Members of the team sat patiently around the conference table while I struggled to comprehend the jargon-filled document. When I finished, the principal asked, “What do you make of that?”

I gave her the only answer I could: “I’m not sure I understand it.”

The team burst out laughing. Then they told me they had been trying to make sense of the report to no avail.

Fortunately, that report was an exception. The people who wrote it undoubtedly had good intentions, but they mistakenly believed that using jargon, clichés, and trite generalities would serve better than straightforward reporting. While most reports are not that flawed, many suffer from the same pitfalls: imprecise and overused words. They often appear together; in fact, they are often one and the same.

Imprecise and overused words. Mark Twain probably said it best: “The difference between the right word and the almost right word is the difference between lightning and a lightning bug.” Never was that more true than in evaluation reports. They require precision and freshness at every turn. Think of the difference between “Multiple interviews substantiated the

claim that…” and “Twelve interviews with program managers substantiated the claim that….” The first sentence is vague, and employs the much overused term multiple; the second is precise, identifying both the exact number of interviews and the participants. Consider these two statements: “The program serves diverse age groups” versus “Fifty percent of program participants are 20 to 25 years old; 30 percent are 25 to 30; and the remaining 20 percent are older than 30.” The first statement draws on that much abused word diverse to substitute for precise, pertinent statistics. Remedy: After completing a draft of each report, read it with eagle eyes to be sure that every word is as precise and fresh as possible. If you aren’t sure, call on a critical friend who will run a precision and freshness check for you.
Meet Paula Pipes  
Each quarter we will feature an IC TIG 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 a sole proprietor engaged 100% in my consulting practice. Most of my work is with nonprofit social service providers and focuses on evaluation and other types of social research. In a previous career, I worked in for-profit corporations, specifically in Human Resources Information Systems using data analysis and technology to support HR functions. I have found that my HR experience complements my work with nonprofits very well and I often use it to help clients think strategically about aligning their organizational structure, processes, technical systems, and client programs to achieve their mission.

2. What is your disciplinary background?
After I left Human Resources, I obtained a Master’s in Sociology. My graduate work focused on religion, ethnic identity, and immigration. Believe it or not, that combination led to my research on nonprofit social services, but how it did is a story for another time.

3. How long have you been evaluating, and how long have you been an independent consultant?
I basically entered evaluation at the same time that I became an independent consultant – about 7 years ago. After graduate school, I wanted to continue in research so I worked as a Research Associate and Project Director on a four-year national study at the University of Houston. Soon after, a nonprofit leader familiar with my work contacted me about doing a program evaluation. I officially started my company when I got a second project.

4. Are you primarily qualitative, primarily quantitative, mixed methods? Which do you prefer?
Most of my projects utilize qualitative methods and descriptive statistics. I am interested in developing contacts with strong quantitative researchers both for collaboration and for sub-contracting opportunities.

5. What was your favorite evaluation experience?
It is ongoing work with a long-term client. I am sensitive to the downside of achieving insider status, but I also see tremendous benefit to understanding the context and how a specific project relates to an organization’s overall strategy and mission. One particular client has engaged me in a variety of research projects, which enables me to think holistically about their needs.

6. What type of experience have you had that was less than ideal?
Ironically, it is a situation similar to my favorite experience. I have been the external evaluator for a very large institution on multiple innovation grants. As a large institution, these grants are treated as discrete, unrelated projects but I often see common themes across them. I have been unsuccessful in convincing the institution to maximize their investment by structuring these evaluations to identify and study some common elements across the projects.

7. Have you had any comical experiences?
Nope. [Just kidding.] I really enjoy workplace humor so look for it wherever I can. I laugh when I think about how I got started with one client. She was new to her role and someone suggested she call me about an evaluation project. She mistakenly thought I had worked for her nonprofit before. When I answered the phone, she quickly introduced herself by saying, “I understand you are our Houston-based researcher.” I had no idea what she was talking about but it sure made the proposal phase go smoothly.

8. What do you like to do when you’re not evaluating?
I enjoy spending time with my best friend—my husband. We enjoy travel and we both like animals. In just 5 days, we are combining both interests and going on a photo safari in South Africa! We have one cat and one house rabbit—yes, rabbits are easily litter box trained. We also volunteer with a house rabbit rescue group and always have one or two foster rabbits waiting to be adopted.

9. Is there anything else you would like your peers to know about you?
Project planning tempered with realism and flexibility is one of my strengths. A former mentor once told me that you can’t turn a boat that isn’t moving. I have learned that even in uncertain, complex situations it is often best to plot a course and get started, knowing you can always adjust your course along the way. In closing, I would like to say that I place great value on integrity.
FAQs & What to Do About Them! by Gail V. Barrington

**Question:** How can I keep my project on course?

**Answer:** While we like to keep our clients happy, some of our biggest problems begin when our proposals are sidelined by changing priorities. We can also lose money before we realize what is happening. To keep your balance and stay the course in an unpredictable project environment, here are some useful strategies:

1. **Ensure that a contract** is in place that lists project tasks, time required, and amount to be paid. Make sure that your contract has a change clause so that if either you or your client requires a substantive change (such as adding focus groups, sites, or tools) there is a quick and relatively easy way to make revisions. Both parties simply agree to the required changes, write them in, and sign.

2. **Develop a Work Plan** which expands on the original proposal and clarifies expectations. You can interview key informants, review additional documents, and finalize the tasks and schedule. If possible, get the steering committee as well as the client to sign off on the plan. This way everyone is in the loop.

3. **On a monthly basis,** provide a brief **Status Report** that lists project tasks along with their current status (complete, in progress, or not started). Add a quick descriptive paragraph about successes and emerging issues. Use the report as a deliverable for your milestone billing.

4. **Follow up with a monthly conference call** with the client. This provides an opportunity to confirm that your current assumptions about the project are correct. The conversation strengthens your communication links with your client and enhances project immediacy. It allows you both a chance to identify issues and find solutions.

5. **Have a policy of no surprises.** Make sure your clients know you feel this way and that being informed is as important to you as it is to them. Then, as they deal with their own changing world, they may be more likely to keep you apprised as well.

Strategies such as these have many benefits. Most importantly, they allow you to scan the rough seas ahead, make course corrections, and stay responsive, all within the agreed-upon parameters of your proposal.

Gail V. Barrington

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

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**Mark Your Calendars: Annual Conference IC TIG Dinner!**

Join us for a night out with the IC TIG during Evaluation 2014! Immediately following the IC TIG Business Meeting on Thursday evening (October 16), we will take the free 16th Street Mall Shuttle to Wynkoop Brewery for a private dinner. Wynkoop is a classic Colorado restaurant, founded by our now Governor, John Hickenlooper, and is a favorite among locals and President Obama. Attendees will be able to choose from four entrees (prices do not include taxes or gratuity):

- **Roast Garlic Polenta, Wild Mushrooms and Tomato Jus.**
- **Spicy Lemonade, Iced Tea, CocaCola Soft Drinks, and Wine will be available in addition to the Brewery’s extensive micro-brew collection.**

The dinner is capped at 40 participants, so reserve your spot today! To sign up, please email elena.harman@gmail.com with your name, entrée selection, and any dietary restrictions.

- **Buffalo Meatloaf ($20)**
- **Grilled Scottish Salmon ($25)**
- **Spring Vegetable Risotto ($17)**
- **Roast Breast of Free Range Chicken ($20)**

The dinner is capped at 40 participants, so reserve your spot today! To sign up, please email elena.harman@gmail.com with your name, entrée selection, and any dietary restrictions.

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