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Winter 2011-12

Independent Consulting TIG Newsletter

May Your Business Flow Like a River! by Rita S. Fierro 2012 TIG Chair

I'm riding a matatu, a small van with 14 seats, public transportation Nairobi-style, to a friend's house where I've never been before. My friend says the stop where I need to get off starts with "M-W" and ends with "T-O", as he's not sure of the exact spelling. So I get on the matatu without knowing exactly where I'm going, having never been there before, counting on my instinct and the kindness of people to help me get there. In the past three years I've done this in my business a lot.

For me, 2012 has begun with many professional shifts, mostly unexpected. In its brief beginning, it's proving to be a breakthrough year. Last year I heard Steve Jobs' speech at the 2005 Stanford commencement; one key point he made was, "You can't connect the dots looking forward – you can only connect them looking backwards." I mumbled to myself, "I sure hope so." Now, goals that I set for myself three, two, and one year(s) ago are showing signs of fruition.

Like many others, my business was affected by the recession. I now recognize that it was an opportunity to discover the truth about myself, my priorities, and the work that was really mine to do. I spent the past two years growing and choosing what type of consultant I really wanted to be and what I wanted to be known for. It is the marketing side of business. I avoided marketing as long as I could. I've now completed a process I call *genuine marketing*: finding out the truth of what you have to offer. The process is allowing me to attract the clients with whom I want to work.

The dots are finally connecting backward. Wherever you are in your personal growth and business practice, whether you are just discovering consulting, on your way to accepting it as your path, or well-consolidated in your practice, I wish you a productive year that may take you not necessarily where you want to go now, but where you need to go to be able to connect the dots backward to the bigger picture that's most important to you.

I'm at the end of my matatu ride. The man seated next to me tells me that my stop is called Mwimuto, which means River in Kikuyu. Let us all go where the river of purpose and integrity takes us.

Inside this issue:

MAKING 2012 BEST YEAR EVER FOR IC TIG MEMBERS

The leadership team could use your help to make this year the best ever the IC TIG. If you love us as much as I know you do, please sign-up!

Help organize professional development webinars by and for IC TIG members. If you have access to a webinar platform we can use for free OR know about free platforms we can use, contact Rita Fierro.

Online survey of our members to find out what they want from the TIG and work towards creating a database of our TIG consultants and areas of expertise. To help and/or provide quick feedback on the idea (agree or disagree) contact Randi Nelson.

IC TIG week for AEA365. Contribute to our week by writing a 200-word submission. Randi Nelson is collecting volunteers.

Facebook page. Email Cindy Banyai to help with regular posts of resources on our FB page after it is launched (coming soon).

Newsletter. Please feel free to submit short articles, send us a note about an upcoming event, or drop Loretta Kelley a line with your ideas. [See Page 4 for deadlines.]

Thank you for your help, attention, commitment, and fashionable membership!

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

Randi K. Nelson

"On reflection, it made me realize how critical it is to be very clear upfront about what you want the team to do and, no matter how long you think working with an advisory team will take, you should double your time estimate."

Randi K. Nelson
2012 IC TIG Chair-Elect

Partners in Evaluation LLC

1. Please describe your independent consulting practice .
Up until this past year, I have operated as a sole proprietor. Since relocating from Colorado to Minnesota (I know, seems like going the wrong direction) I renamed and reformed my business to Partners in Evaluation, a single member LLC. My full-time work now is developing my evaluation business, which involves all aspects of evaluation from proposal development through designing, conducting and reporting program evaluations. My primary focus is program evaluation, though I also get involved in different types of writing and planning projects.

I am fortunate to be living in the Minneapolis-Saint Paul metropolitan area, which boasts quite a few great evaluation firms and independent evaluators. While, I suppose, this makes it quite a competitive area, it is also rich in opportunities to collaborate with other professional evaluators. I have been working with several others to develop proposals and collaborate or subcontract on projects that are too big to tackle alone. It is a great way to grow beyond my content-area expertise into some interesting new areas of evaluation.

2. What is your disciplinary background?
I have quite an eclectic educational and professional background in applied agricultural research in universities and business, as well as teaching agricultural education for five years in the largest school district in Minnesota. Some days this feels like a very strange mixture of education, skills, and experience to bring to evaluation, but most days I feel very fortunate to have a rich history and diversity of experiences to apply to my evaluation practice. I have undergraduate and graduate degrees in agriculture and agronomy from Arizona State University and the University of Arizona, respectively. I also have a M.Ed. in agricultural education and a Ph.D. in Evaluation Studies in what used to be called Education Policy and Administration, both from the University of Minnesota.

3. How long have you been evaluating, and how long have you been an independent consultant?
I began to conduct evaluations independently or as a subcontractor on a part-time basis when I began my Ph.D. program in 2003. After completing my Ph.D. in 2009 and moving to Colorado, I worked for a private evaluation and planning consulting firm in Denver for one year. Since returning to Minnesota in the summer of 2011, I have worked full-time to start Partners in Evaluation LLC.

4. Are you primarily qualitative, primarily quantitative, mixed methods? Which do you prefer?
In the best of all possible worlds, I would focus all of my work on evaluations that use qualitative data since I love to interview people and conduct focus groups. I enjoy the challenges of figuring out what people mean when they describe their experiences and thoughts. That being said, I have been known to lose myself for hours playing with numbers from survey results. I don't think either qualitative data or quantitative data does a great job alone to fully describe a program or its outcomes. So, I highly value and try to use a mixed method approach for most evaluations.

5. What was your favorite evaluation experience?
My favorite evaluation experience involved working with community members who made up an evaluation advisory team for a study of the effectiveness of an H1N1 influenza communication plan in the Latino community in a Colorado county. I would also have to say I could nominate this experience as one of my "less than ideal" evaluation experiences. The best thing about it was that it actually worked. We made changes to the evaluation plan and data collection instruments based on the advisory team's input. The team also provided some

FAQs and What to Do About Them!

By Gail V. Barrington from her 2012 book *Consulting Start-up & Management: A Guide for Evaluators & Applied Researchers.* **Los Angeles: SAGE**

Question: Do I really need liability insurance?

Answer: Consultants see liability insurance as complex, time-consuming, and expensive, so we tend to avoid the issue until faced with a contract that requires it. Ironically, our clients force us to think about our own risk as well as theirs.

Professional Liability Insurance and *Errors and Omissions (E&O) Insurance* are the same thing. It protects you against being sued for losses a client may suffer due to an error, omission, or negligent act arising out of the services or advice provided by you or your firm either now or in the future.

There are two types:

Claims made: protects only against claims occurring during the policy period (the less expensive option)

Occurrence: protects against claims based on the policy period even if made years after the negligence occurred or the policy has expired (more expensive but more comprehensive).

What to do about it? Buy it!

Suggestions:

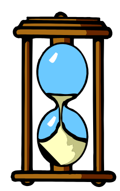
- Find a business or professional group insurance plan.
- Get an insurance broker to search for you.
- Lower the cost by using that broker for all your insurance needs.
- Select a higher deductible.
- Practice due diligence to decrease potential risks.
- Ensure that your business processes run efficiently.
- Communicate effectively and often with your client.

LAST CALL FOR 2012 AEA CONFERENCE PROPOSALS!

It's not too late—yet!! The IC TIG needs your proposal submissions for the 2012 AEA Conference in Minneapolis, MN, October 24-27.

The conference theme is Evaluation in Complex Ecologies: Relationships, Responsibilities, Relevance.

DEADLINE: Friday, March 16, midnight US Eastern time.



"Be daring, be different, be impractical, be anything that will assert integrity of purpose and imaginative vision against the play-it-safers, the creatures of the commonplace, the slaves of the ordinary."
Cecil Beaton

Nelson Interview — continued

great insights into interpreting the evaluation findings and contributed to developing some strong and feasible recommendations. The downside of this experience was how much time and effort this took to communicate with the team and get us all working together effectively. On reflection, it made me realize how critical it is to be very clear upfront about what you want the team to do and, no matter how long you think working with an advisory team will take, you should double your time estimate.

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

I know there have been many amusing things that happened in the course of an evaluation, but I cannot think of a single one now. That's another good reason to keep an evaluation journal.

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

I love to read mysteries, watch almost any kind of movie - except horror flicks - and get together with friends, doing almost anything except spelunking and downhill skiing.

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

As a result of spending much of my youth outside of the U.S. (Cuba, France, Philippines, and Malaysia) due to my father's work with UNESCO, and because of my Peace Corps experiences in Barbados (a very tough assignment), and an Earth Watch trip to Kenya, I have a bit of wanderlust. So, I am always looking for opportunities to collaborate on interesting international projects. Regardless of where you live and work, I am looking forward to getting to know and work with the welcoming and thoughtful colleagues who make up the Independent Consulting TIG.

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The Independent Consulting (IC) Topical Interest Group members are sole proprietors, or have formed limited liability companies, partnerships, or corporations who work alone, with small staffs, or "as needed" sub-contractors. Our backgrounds are as varied as most of AEA. What we share in common is collegial and friendly support of one another as independent evaluators.

IC TIG Mission Statement In Brief

- *Foster a community of independent evaluators by reducing the isolation of being an independent consultant*
- *Promote independent consulting as an evaluation profession*
- *Increase the professionalism of independent consultants*

The complete text of the mission statement is on the IC TIG website below.

Independent Consulting TIG website

Making Down Time Productive: My Experience as a Volunteer Evaluator

By Marcela Gutierrez, PhC
Gutierrez Consulting Partnerships

In 2008 I left the organization I had worked with for 9 years and became an independent consultant. The learning curve was steep and painful, but I enjoyed being free to choose my own work and clients.

The periods when I am not too busy or am in between projects are the hardest aspect of this work. I decided a good use of this time, when I could learn a lot and feel useful even without being paid, was to do volunteer evaluation work. In 2010 I became a volunteer with Bankers Without Borders (BWB), the technical assistance arm of the Grameen Foundation. BWB matches volunteer consultants with micro finance institutions (MFIs) worldwide.

Almost a year later, I was approached to help an MFI in West Bengal, India, develop a survey to document the social impact of their loans to make a stronger case to funders for their capital campaign.

At first, I doubted we could accomplish the goals we had set during a 5 day visit to Kolkata. I could not have been more wrong. In two days, with the help of a representative from a technical assistance intermediary based in New Delhi and the dedicated MFI's Executive Director, we drafted a 24 question survey using a template I had brought. Next, we piloted the survey in a village branch office 3 hours from Kolkata in the midst of the monsoon rainy season.

Back in the office, we selected an evaluation design and sampling strategy for the quasi-experimental study that would ultimately involve 414 clients and non-clients. When I left Kolkata, we had a clear plan for finalizing and translating the survey, training data collectors, drawing randomized samples, and dealing with data entry and analysis. All this was accomplished in 5 days, with some time left over to wet my feet in the Ganges River.

Now I am in my native Argentina working on the analysis and final report, and connecting with colleagues in India via e-mail and Skype. I am happy to report that the analysis shows positive results, and the MFI will be even happier to hear this.

I gave over 100 hours of free consulting to this project. In exchange, I gained new knowledge, made new business connections, and contributed, I hope, to improving the lives of Indian women living on $1 a day—this alone was well worth my time.

The IC TIG newsletter is published four times each year.

2012 newsletter deadlines are May 31, August 31, and November 30.

Please send submissions, suggestions, or questions to our newsletter content editor Loretta Kelley at **LKelley@kpacm.org**