Listening and Learning by Randi Nelson 2013 TIG Chair

In trying to find inspirational words for my first newsletter contribution as Chair of the TIG, I came across these quotes about listening and learning. I hope they provide a productive theme for the year.

“The most basic of all human needs is the need to understand and be understood. The best way to understand people is to listen to them.” Ralph G. Nichols

“The more that you read, the more things you will know. The more that you learn, the more places you’ll go.” Dr. Seuss

My friends have told me I ask great questions. I suspect this is their diplomatic way of saying my questions are better than my answers. In any case, here are some questions I hope will prompt some shared learning within the vibrant group of evaluators who make up the IC TIG.

• What kinds of collaborations have you engaged in with other evaluators? What made them successful?
• What has been your most effective marketing strategy?
• What are the pros and cons of credentialing evaluators such as the CES endeavor?
• What kind of skill-building opportunities do you want and need? How do you want these delivered and what would you be willing to pay for them?
• If you have been a mentor or advisor to others, what made it productive (or not)? If you want a mentor, what would that relationship look like?

LAST CALL FOR AEA CONFERENCE PROPOSALS!
The IC TIG needs your proposal submissions for the 2013 AEA Conference in Washington, DC, October 16-19, 2013.
The conference theme is The State of Evaluation Practice in the 21st Century.
DEADLINE: March 15, midnight EST

Expanding Web Duties - Matt Feldmann, IC TIG Webmaster

At the IC TIG Meeting in Minneapolis last October, our members were surprised to find several newer members interested in joining me with the webmaster duties. Before we started voting for a second Co-Webmaster, we agreed to develop a new Media Committee with me coordinating the activities. Previously, the IC TIG Webmasters were charged with updating and maintaining the IC TIG website, responding to inquiries sent to the website, and participating in AEA-sponsored webinars. Now with the Media Committee, the TIG has the ability to provide further support for social networking opportunities and develop more web-based databases for our membership. At this early date, we still do not know exactly how the Media Committee will develop. Two immediate tasks we are pursuing will be to incorporate the TIG Facebook page that Cindy Banyai has developed for the TIG and to create a searchable database of TIG members that will include their expertise, geographical area, and other attributes. Stay tuned: We expect to have new opportunities and resources for the TIG.

The 2013 members of the Media Committee are:

Yer Chang
Matt Feldmann
Laura Keene
Doug Moon

Inside this Issue:
Meet an IC TIG Member 2
New Direction by Katrina Starnes 3
Virtual Colleagues by Fred Glantz 3
FAQs and What to Do About Them! by Gail V. Barrington 4

Next newsletter deadline: May 31, 2013
Please send questions, submissions, or suggestions to Loretta Kelley at LKelley@kpacm.org
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@kpacom.org

Sukey Blanc

1. Please describe your independent consulting practice.

I am the founder and principal researcher of a small, Philadelphia-based evaluation firm, Creative Research and Evaluation (CR&E) LLC. Most of my work centers on program evaluation for K-12 educators, university programs, and community organizations. In addition to providing formative and summative program evaluations, I work with clients who are interested in participatory evaluation and other ways of enhancing their internal evaluation capacity. CR&E has been in existence for approximately five years. In some projects, I work on my own, and for other projects I draw on a network of research consultants who bring additional skills.

2. What is your disciplinary background?

I have a BA and a PhD in anthropology. In between studying anthropology, I received an MA in linguistics, an MA in education, and a certification to teach secondary school mathematics.

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

I joined the staff of a non-profit evaluation group in 1992. I began working part-time as an independent in 2007 and became a fulltime independent about 18 months ago.

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

As an anthropologist, my training and expertise are qualitative, and some of my projects are purely qualitative. However, I have always worked closely with quantitative colleagues, and I often develop mixed methods designs, in conjunction with quantitative experts.

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

One less than ideal experience was sitting in an audience at a conference and the PI of the project announced that they were hiring a new evaluator. I was concerned that there were some communication problems, but I wasn’t prepared for a public announcement that I was being replaced.

6. What was your favorite evaluation experience?

Overall, my favorite experiences are when clients are working with data because they want to learn something, not because they are meeting a mandate. Recently I have been working with a folk arts education program that audio-tapes and video-tapes many of its activities. The staff and participants appreciate the fact that I share their ethnographic sensibilities, but are also very eager to learn how to look at these materials using an evaluation lens. Another favorite was a mixed-methods evaluation of a school privatization initiative. This was the most rigorous evaluation I’ve worked on, and it was very controversial – well received by activists and educators, but treated with hostility by the for-profit education companies that would have benefited from different findings.

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

Mainly mistakes that I make—like getting lost (multiple times). One longstanding joke is that once when my mentor in my former job asked me what I had learned from her, the first thing I said was “You taught me to check my lipstick before going into a school to interview the principal.”

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

My newest passion is supporting my CSA (community supported agriculture). It’s an urban farm at a local high school, and I love to spend time there when I can. Longtime passions are travel, hiking, reading novels, and spending time with my husband and grown daughters.

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

I look forward to getting to know IC TIG members and am happy to travel for out-of-state projects if anyone is looking for a collaborator.
Virtual Colleagues—A Valuable Service of the Independent Consulting TIG

By Fred Glantz, Kokopelli Associates LLC

Working on my own took a lot of getting used to. Perhaps the thing that I miss the most about not working for a large company is the ongoing support of my colleagues on a real-time basis. However, my company, Kokopelli Associates, is a “virtual company” in that I have a large group of nationally-respected experts in their field who I can bid and use on contracts on an as-needed basis. When faced with a knotty problem, my virtual staff are available with quick answers that saved me the time and effort needed to solve the problem myself. When faced with a vexing sampling issue I didn’t have to spend hours leafing through sampling statistics books to get an answer; I could get help from one of my company’s sampling statisticians. As an independent consultant, I really missed not having colleagues that I could turn to for some quick advice.

It then occurred to me that members of the IC TIG could help one another on an as-needed basis. You may not be able to go down the hall and knock on a colleague’s door when you need some quick advice or an answer to a question, but you could certainly pick up the phone or call or send them an email.

Virtual Colleagues are members of the IC TIG who have graciously offered to let you “knock on their doors” when you need some help. As with the TIG’s peer review service, your virtual colleagues will provide their assistance on a pro bono basis.

Becoming a virtual colleague, or getting help from a virtual colleague, is quite simple. To become a virtual colleague, all you have to do is provide the TIG’s Webmaster with your name, contact information, and your areas of expertise that you are willing to share with your fellow TIG members. This information will then be posted on the Virtual Colleagues Page of the TIG website. Getting help from a virtual colleague is just as simple: login to our website; go the Virtual Colleagues Page; find someone with the expertise that you need; and call or send them an email.

New Direction

By Katrina Starnes, KES Research Group, Evansville, IN

It was an amazing discovery: attending the AEA conference last fall for the first time I found myself surrounded by individuals whose stories of “falling” into evaluation from other disciplines closely mirrored mine. Intensely curious, dedicated, and committed colleagues surrounded and welcomed me with open arms. For those at this event, it was clear this work is more than just a career; it is akin to a calling.

My own personal journey from research to evaluation work is one from the corporate research world. After honing expertise in market research, both agency and corporate-side, I launched my own consulting business in 2007. More than terrified, I took this big leap of faith knowing that to balance family life and career aspirations, this was the direction I had to go.

Within two months I was blessed with steady work and for the next four years I focused primarily on maintaining my certifications and balancing the demands of a few key clients. After a while there was a shift; everywhere I went there seemed to be some indication that change was coming and in my own heart I knew that, after more than a decade in my field, I wanted to utilize my talents in a new way.

I received a phone call last July from a friend with a grant-writing business; one of her main clients was applying for a large grant and needed an evaluator to help with the application and supply the evaluation work if they received it – would I be interested? After researching the type of work needed, I discovered much of what I had done as a researcher provided me with a toolbox of transferable skills. Excited by the idea of a new challenge and chance for personal and professional growth, I accepted. We submitted the grant and waited.

The phone soon rang with the excellent news – the organization had won the grant and work needed to begin immediately! I booked my attendance at the AEA conference and my full-scale foray into evaluation began. A few textbooks, learning sessions, and a conference later, I know there is so much more to learn, but I am truly energized and excited to be joining this field. Knowing I am a part of a group of other independent consultants provides the sense that I am “not alone” in this new adventure!

Looking forward to further discoveries!
FAQs and What to Do About

Question: How can I build a strategic alliance?

Answer: Strategic alliances can provide you with a competitive advantage. By creating a relationship with an individual or group that has different and complementary skills and competencies, you can pursue larger, more complex projects, provide more varied services, and reach a broader geographic area. In return, you can decrease your competition, achieve economies of scale, and share costs.

However, strategic alliances are often built on “a wing and a prayer” and they may not be robust enough to achieve a successful outcome. Reasons for failure include poor partner choice, differing values or culture, unclear goals, project management issues, and unequal benefits.

Strategies:
The Boston Consulting Group has developed a strategic alliance process model which can be adapted for the independent consultant:

1. **Remember your goals.** Don’t lose your own business plans in the flurry of this engrossing project. There will be life after it is over so keep your long term goals in mind.

2. **Be rigorous.** Determine potential team members’ competencies, work standards, reputation, ethics, interpersonal communications, and team skills. Review samples of their work and set up a small preliminary project with them to test the relationship.

3. **Get it in writing.** Develop a Memorandum of Understanding for the project outlining roles, responsibilities, communication strategies (both within the team and with the client), data ownership, and report authorship. Develop a sub-contract for each consultant or group specifying tasks, daily rate, number of days, and insurance and tax responsibilities.

4. **Manage.** Use good project management skills to ensure clear and frequent communications, budgeting, scheduling, and reporting. Make sure your client is apprised of your relationship.

5. **Evaluate.** Whether positive or negative, key benefits from the experience are likely to be the learning and insights gained from working with other consultants.

6. **Diversify.** This may be only one of several alliances you develop depending on the type of projects you want to pursue. Build on the lessons from this relationship.

Make sure your early strategic alliances are successful. They will transform your practice and broaden your portfolio in ways you never dreamed.


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