

Independent Consulting TIG Newsletter



Ways to stay in touch

- Join our [IC TIG Facebook page](#), which is intended as a communication tool for everyone.
- Let us know if you would like the TIG to repost your blog, make announcements, voice concerns, or share tips.
- Let's stay connected and make sure all voices are heard! Reach out to robertl.perez1@gmail.com

Questions:

Please send questions, submissions or suggestions to [Loretta Kelley](#).

Chair-Elect Column



Nina Sabarre
Intention 2 Impact Consulting

Greetings, IC TIG members!

Months into the global pandemic, we have shifted from initial shock to finding ways to cope with our current reality. I don't know about you, but I struggle with the phrase, "new normal." What is normal and who decided?

One thing is for sure - life as an independent consultant is not "normal" to many people. We are a resourceful, hardworking, and creative bunch, and I am proud to be associated with you all. Thank you for the ongoing support this group provides. From weekly support calls, to mastermind groups, to capacity building opportunities, and thoughtful email threads, being part of this TIG gives me strength and resilience. If you do not feel you are reaping the benefits of the TIG, please join our Facebook group, LinkedIn group, and check your AEA settings to make sure you are receiving the emails from the discussion board. Our leadership team is working hard to improve our communication with members - including this monthly newsletter. We are currently evaluating our first round of mastermind groups and will be launching registration for the next round in June!

I'd like to return briefly to the topic of tired terms... when can we retire the saying, "unprecedented times?" Of course, we are living through a consequential moment in history; perhaps the most defining period of our lifetime. It is terrifying and uncertain, and it is hard to imagine the near future. But the term unprecedented refers to the past. As a society, what precedents have caused communities of color to disproportionately die from COVID-19? What precedents have resulted in millions of Americans un- or underinsured and unable to get the healthcare they need? What precedents have convinced people to turn their back on science? What precedents result in the statistical and practical significance that black men have a lower life expectancy than any other group in America? By saying "unprecedented," we may be ignoring the systems of oppression, inequities, misinformation, and violence that have laid the groundwork for this present moment.

I am humbled and inspired by the movements towards culturally responsive and equitable evaluation. As evaluators, we have a role to play in speaking truth to power, and using statistics and stories to amplify the voices of marginalized communities. I truly believe that. However, I also think it is important to give ourselves space to process as humans before (or alongside) jumping into professional practice. Sometimes I worry about the repercussions of asking, "what can I do as a consultant or evaluator?" before asking the harder questions: "how can I unlearn my own implicit biases and show up as anti-racist?" If we ask the former before the latter, we run the risk of making



Tamara Hamai
Hamai Consulting

I am writing this on an emotional day. I cried this morning.

There are so many broken things in this world.

We are losing lives. Some of the broken things are coming to the surface, becoming more visible at a global scale.

These problems aren't new... but that doesn't make it hurt any less. I'm frustrated, angry, tired, sad... so, I cried.

Then, I took a deep breath and focused myself again on continuing to take action through my work and living my values.

It is okay to be feeling all the feels right now.

You are doing important work, and there are times you need to step back and recharge before getting back out there.

Then, take action to keep living your values. We need you.

My communities in the IC TIG and my Change Makers Legion program have been my support system, on the good days and the bad days.

In 2020, I have never been so grateful as now to be a business owner. It has been my protection from the global crisis (so far), and has allowed me to stand strong in my values without putting my livelihood on the line. I have been able to channel my energy into helping my clients make a bigger impact for individuals, families, communities, and systems.

Now is an opportunity to revisit your business. Take a step back and ask yourself, "Who do I serve and how do I serve them? How does my business serve me and my values?"

This marks the beginning of a series of articles focused on business foundations. Whether you're new to consulting and need to establish your foundation, or you have an established business and revisiting your foundation in light of the changes in the economy/world/life/everything... I encourage you to walk through this process with me.

In the next article, I'll cover selecting your target market, what you do for them, and how you talk about what you do.

First, I'll start you off with a question: **Why should any person or organization give you their hard-earned money?**

Chew on that, and I'll see you next month.

Thank you for all that you do.

Marketing During Uncertain Times



Stephanie Evergreen
Evergreen Data

Do you have any tips on how entrepreneurs can innovate and market their services during times of economic uncertainty?

Everyone has to figure out how to pivot to virtual. How to run virtual focus groups, virtual surveys to hard-to-reach audiences, and so on. But honestly, evaluators have been working on this for quite a while, so the resources are already out there on how to get data collected virtually. In my view, the real work is to communicate that you have a plan and that you know how to collect data virtually. That communication comes in assuring current clients that the project can proceed, with some tweaks, and it comes in assuring potential clients that you are confidently going about your business, still answering the world's pressing questions with data. Your website copy should address your virtual pivot. Your social should, too.

I would not recommend trying to launch brand new businesses or services during this time. New voices trying to break through the noise... unless you are selling PPE, good luck. The strongest position is to pivot your existing work so that you can come from a place of saying "we know what we are doing, we've been doing this for a long time, we've got this."

Have you noticed engagement in online products increase or decrease since the start of the pandemic?

The supply of online products has definitely increased since the pandemic, but I'm less certain that the demand is completely there. True engagement seems to come and go in waves. Interest in online learning is certainly strong, but at

the same time, people have kids underfoot and family members who are sick and all of the hundreds of new ways that life has become harder for everyone. For people with a lot of simultaneous pressures (which is most of us), some weeks are better than others. Some days you can balance it all and dedicate some time to a new online product and some days you can't even make the time to shower. I'm making this answer somewhat personal because it is. How you are feeling is likely how a lot of other people are feeling.

Were there any noteworthy lessons learned from your recent launch?

Our Academy recently opened for enrollment, which we only do twice a year, right when the pandemic was beginning to explode here in the US. I was initially very concerned about whether we would sell out, like we usually do. But business was as usual. We pitch the Academy as an alternative to my in-person workshops and I do think that some organizations realized there would be no in-person workshops for a while. And the Academy has a reputation that sustains through some noise in the world. We also launched a new program with a higher price point and a very small class size. It did not completely sell out, but I'm not surprised. Educating people about a new offer – even without the turbulence of these days – is harder the first time around.

As our launch date grew closer, I paid attention to social media pretty carefully to see whether people would start talking about anything other than COVID. About the time that I was personally ready to start hearing about other news (ANY other news, please!) I saw others in the same place. Had our information consumption remained solely on COVID news, I would have waited to launch enrollment.

Even now that our capacity to absorb non-COVID related information has increased a bit, the smart thing to do is take the temperature every day. Consider what news stories are breaking. Don't post on Fridays, the new weekend. Watch your own tolerance of being marketed to as an indicator of what others can handle, too. And, most importantly, hang in there. Independent consultants, by their nature, know patience, hustle, and the wisdom of playing the long game.

Seven Steps to Being a Successful Independent Evaluation Consultant



Amy Germuth
EvalWorks

A 2009 article by Skolits et al. identified roles evaluators often assume. These include: Manager, Negotiator, Detective, Diplomat, Judge, Reporter, Learner, and Researcher. If you are an independent evaluation consultant, you have

identified another role you must take on: consultant. Here's the rub - the consultant's role is really a placeholder for multiple other roles: marketer, entrepreneur, boss, accountant, etc. That's many roles, and mastering the skills these roles require may seem quite daunting. So daunting that you might ask: How does one become a successful independent evaluation consultant? It's a good question and I'm glad you asked! Here are seven steps to help you along this journey.

- Recognize that as an evaluation consultant you need two sets of skills – evaluation skills and consulting skills. One of these skill sets will not suffice. Gain these skills by reading in these fields.
- Understand that to be successful you will have to play many roles beyond evaluator and consultant. As I noted before, these may include marketer, entrepreneur, boss, accountant, etc. Failing to attend to these roles or letting one role dominate increases the odds your business will fail.
- Market, market, market. Being a successful consultant requires knowing how to market yourself and your business. Continually look for opportunities to get your name and your business's name known among family, friends, and competitors/collaborators, but most importantly, by those likely to purchase your services.
- Recognize that consulting and marketing are about building relationships. Stop talking, start listening. Become part of the community you want to serve. Identify ways you can work with others that bring value to their work.
- Position yourself differently from others by identifying the unique value you offer to clients. Notice that I did not say unique service. What matters most to clients are not what services you provide, but the value your clients perceive in working with you specifically.
- Prepare to work long hours as an evaluation consultant. This is partly because you will play many roles. Hopefully being an evaluation consultant will be the best 60 hour a week job you've ever worked!
- Celebrate! Every step you take is one step towards becoming a successful independent evaluation consultant.

Meet the Member



Pieta Blakely
Blakely Consulting, LLC

Please describe your independent consulting practice.

Blakely Consulting is based in the Dorchester neighborhood in Boston, MA and has been in business since August of 2016. My focus is on non-for-profit organizations who work in communities of color, and are working on issues associated with workforce development, poverty, and inequality in their communities.

What prompted you to become an independent consultant? How did you get into it?

In research organizations, and especially larger teams, processes tend to be fixed rather than flexible. Being an independent consultant has allowed me to develop many business process “styles” and approach each assignment as a unique situation, where I can bring my best practices to bear on developing a solution.

I started my practice as a result of working in a larger organization that was developing a measurement program that was to be rolled out across many different research organizations across the country. It became clear that the “one size fits all” approach was going to fall short of the program goals. The experience really highlighted to me how measurement can be done at the expense of learning and improvement. I wanted to contribute to organizations

doing important work better. Subsequently, I left this team and started my own consultancy with a focus on flexible solutions to meet my client's needs.

What's unique about the work you do?

My PhD thesis was based on availability of resources in urban environments, and their effect on ameliorating poverty and unemployment. I also have years of experience working in various community development and educational settings. I think the combination gives me a unique perspective on what works and what the strengths of community-based organizations are.

What advice would you give to someone new to independent consulting?

First: This is not a part time job, and initially will require more than 40 hours/week to get the business up and running.

Second: Focus on the basics in the beginning: marketing, networking, social media, to build up a contact database. These people and organizations will eventually be your paying clients.

Third: Be prepared for a few lean quarters until you have established the business and its brand.

Fourth: Focus! You're not McKinsey and you need to decide what area you want to consult in, and work to develop business in that segment.

Last: Partner. Identify and build relationships with firms that address different issues but within the client group you are targeting. Often client organizations will need support in multiple areas, such as development, evaluation, and organizational development. Find firms that don't offer what you do and partner with them to develop business.

If you could tell every member of the independent consulting TIG to read one book, what would it be and why?

W. E. B. DuBois's Data Portraits: Visualizing Black America. It's a collection of data visualizations that DuBois and his research team prepared to depict the status of African Americans at the turn of the 20th century. The charts exemplify effective data visualization, tell clear and surprising stories, and challenge many of the stereotypes of the time (and this time, too). DuBois's Data Portraits demonstrate best practices in data presentation unclouded by computers. Many evaluations have good data but fail to present it well. And since presentation is at the end of the process (after all the money has been spent), it's crucial that it be organized and presented properly.

What do you love most about being an independent consultant?

My independence! The ability to tailor a program specifically to a client's needs. The opportunity to meet people who are working on important problems, and be a part of their organizations.

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

Crossfit, baking (recently vegan and wheat-free), jewelry-making, and reading.

USAID 2nd Annual Overseas Small Business Conference Notes 2020 - Doing Work in Conflict Zones



Tevin Medley
Medley and Todd-Roberson Consulting LLC

My name is Tevin Medley and I run a boutique consulting firm specializing in Monitoring and Evaluation for international development projects. I have been anxious to share conference notes discussed by panelists, guest speakers and those who just happened to be sitting together at lunch. As a member of the IC TIG, and with a nudge in the right direction from IC TIG Leadership, I will present some key takeaways that might also be helpful to other evaluators.

The 2nd USAID Overseas Small Business Conference was held in Frankfurt Germany on March 3rd and 4th 2020 with over 300 organizations in tow. Kicking off the event was Mauricio Vera, Director of the Office of Small and Disadvantaged Business Utilization (OSDBU), followed by Patricia Lacina, Consul General, U.S. Consulate in Frankfurt Germany.

Other speakers included Senior Procurement Executives, Country Representatives from a handful of global Missions and organizations of all sizes. The overarching goals of the conference were to: connect small businesses with each other, clarify the goal of increased usage of small businesses, provide time for Q&A and networking. This conference wasn't just about grants and contracts but rather working together to solve some of the world's most complex development challenges.

One of the sessions lended insight into doing work in conflict zones mentioning: Mali, Libya and Yemen. Here are some key takeaways:

There is a growing need for monitoring and evaluation in conflict zones by major international organizations. The biggest issue they face is finding support staff that can collect the data they need. USAID, as well as other large firms are increasing reliance on small businesses for M&E in conflict zones.

It's important to study country context before doing work in conflict zones. This means having a good understanding of field support mechanisms, security plans and security personnel. While some contracts will not require you to have a Security Manager for work in the region, best practice is to include an outline of your organization's security plan overseas. This becomes even more essential when bidding on RFPs in Hardship or Conflict Zones. Flexibility is key. Situations on the ground in conflict zones change rapidly meaning that in order to be successful, an organization should have mechanisms in place to adjust quickly.

One way organizations can offer M&E services in conflict zones is to partner with local organizations and submit a joint proposal. For many contracts and grants, a winning bid in some areas can only go to an organization that has been doing work in the region for several years.

This means that establishing partnerships with grass-root organizations, nonprofits and local entities is a good way to get a foot in the door overseas. Here are some things to keep in mind when looking for overseas partners to help provide services in conflict zones:

- There should be a system in place to vet overseas support staff
- The overseas partner should be reputable
- You should have a solid understanding of the tax environment, and
- You should seek out in-country legal support for any issues that may arise from your work overseas

I hope that this information can work as a catalyst to inspire businesses to share more with one another. When we share our successes, failures and lessons learned, we become stronger as a community of evaluators.

<https://drive.google.com/file/d/1Exp7lwwRfvQ7tH2mkl0m-lavnl9sg9dZ/view>

The Best of Gail



Gail Barrington
President, Barrington Research Group

Gail Barrington, our columnist and independent consulting guru, is taking a break from writing for this newsletter. So that we can continue to benefit from her wisdom and experience, we are recycling some of her previous articles. This one was published 08 January 2014 and is especially relevant these days of working at home.

Check out Gail's latest blog at
<https://barringtonresearchgrp.com/blog.html>

The complete list of Q & A's is on her website
<https://barringtonresearchgrp.com/ask-gail.html>

The Home Office — Pros and Cons

Coffee time again! George has already arrived and he has news.

Gail: Hi, George, you look excited.

George: I have a project! The school district called me for an analysis of achievement scores. Their evaluator quit and they need these results urgently.

Maggie and Chris: (arrive laughing) Congratulations!

George: Just what I like, lots of statistics. But I can't work at the University. I still share an office there but I need space to spread out and get organized. What are the pros and cons of a home office?

Gail: It's an excellent place to start your consulting business. There are several advantages:

- It's **economical**. You save money on gas, parking and lunch.
- You **save time**—no commuting.
- It's **flexible**. You set your own working hours.
- **You're your own landlord**. You make all the decisions about your office space.
- Your **pets** can keep you company.
- When you incorporate, you can use it as a **tax write-off**. Talk to your accountant.

Maggie: But there are some drawbacks too. There is a big impact on your family. When I started it was sort of temporary. I worked at the dining room table. There were project files everywhere. Then it was Thanksgiving. The whole family was coming for dinner and I had move my office to the basement overnight. There were babysitting issues. Eventually my mother helped me out and now that the twins are in school, it's fine.

Gail: What does your wife think about this, George?

George: I don't know. I've always worked outside the house. She has her own routines.

Gail: Well, talk to her about it. Make sure she supports the idea.

George: Yes, okay. Any other disadvantages?

Chris: My fiancée and I rent an old house and I had some electrical issues. With my computer, printer and various other plug-ins, I blew the circuit when I tried to make a cup of coffee. I had to hire an electrician. My fiancée wasn't happy about that!

Maggie: Lighting can be a problem. There was only one dim bulb in the basement. I had to buy some good reading lights so I don't get eye strain.

Gail: You need a mailing address that is separate from your personal one. Get a post box but remember, couriers don't deliver to boxes. Sometimes you need to provide your physical address.

George: Well so far there's nothing I can't handle.

Maggie: When you need social support, just call on us.

Chris: Yeah, we love problem solving. (His phone chirps.) Got to run!

All: Bye. See you next time!

Gail Vallance Barrington

Barrington, G. V. (2012). Consulting Start-up & Management: A Guide for Evaluators & Applied Researchers. Los Angeles: SAGE.

<http://www.startofhappiness.com/wp-content/uploads/2012/06/wheel-of-life.jpg>