Volume 3, Issue 4 Oct 2012

Fall 2012

Independent Consulting TIG Newsletter

My Story, Your Story by Rita S. Fierro 2012 TIG Chair

September in the States: crispy contagious air of a new school year merges with the acceptance that it will soon be cold. I make September (not New Year's) resolutions. This year, one comes from a summer lesson: staying connected to my own story.

In Ethiopia, I used participatory leadership, evaluation capacity building, and emotional awareness skills to lead a team of researchers collecting stories to help adolescent girls. Collecting 300 stories in two weeks, we heard stories of poverty and violence, but also hope. At our first meeting, I asked researchers to tell childhood stories. After much probing and silence, one told how at age 7 he got into his father's car, turned it on, and started rolling straight for a wall. His expression shifted from terror to laughter as he told us that the car stopped 5 inches away.

The story brought lightness to a meeting focused on survey administration and handling stories of sexual violence. We always opened with a personal story. It was some time before the women on the team spoke up. Privately, I encouraged them to choose stories that would help the men understand what it means to be a woman.

The practice of storytelling highlighted the relevance of our work and helped develop an incredible team spirit and support system. Mid-project, one researcher said, "This is now our project. We own it."

The experience prompted me to stay connected to my story, both the one I've been telling about myself for years, or a new, reinvented one. As researchers, we share other people's truths; we must not disconnect from our own.

When I was 9, my 14 year-old brother, who used to beat me up, got boxing gloves for Christmas. Like "Rocky," he was learning how to be a man in a petite body. He takes one and hands me the other: "Hit me with all your strength, right here…" He's pointing to his jaw. It sounds like a trick. "You'll kill me if I hurt you!" I say. "There's padding, you can't hurt me," he says. I throw a punch loaded with five years of frustration. His nose bleeds. I'm terrified. He will really kill me now. Instead, he runs to the bathroom and never talks about it again. Today, he still doesn't remember.

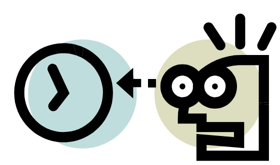
As you set your "New Year" resolutions, remember that you are vulnerable, but also powerful!

Inside this issue:

Hoping to See You in Minneapolis!
By Deborah Levy, IC TIG Program Chair

From October 24th-27th, AEA will convene its 26th annual conference in Minneapolis, Minnesota. Minneapolis is known for its commitment to progress, world-class cultural attractions, and a vibrant community of evaluators. The professional development workshops, as well as Wednesday sessions, will be held at the Minneapolis Hilton. On Thursday, Friday, and Saturday, the conference will move to the Minneapolis Convention Center.

The Independent Consulting TIG has grown immensely in the last several years. This year we are proud to have nineteen sessions in the program, including our annual IC TIG Business Meeting and dinner on Thursday evening (contact Sukey Blanc to make your TIG dinner reservations). To see the entire list of sessions for the TIG, visit the AEA Web site at http://eval.org/search12/tigschedule.asp. Please support your TIG and come out to some of these exciting and interesting presentations, panels, round tables, and discussions!



Next newsletter article deadline:

November 30

Please send questions, submissions, or suggestions to the newsletter content editor 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@kpacm.org

Cindy Banyai

"I've become quite fond of the impact social media has on my business and I love helping other independent consultants get started using them."

Cindy Banyai

Refocus Institute

1. Please describe your independent consulting practice.

The Refocus Institute is run as a sole proprietorship with international partners. I focus on training in evaluation, particularly in participatory and emergent visual methods (participatory photography/ video), in the international and community development arena. I also offer services in logframe development/strategic planning, evaluation system assessment, qualitative data analysis, social media management, Asian cultural competence, and traditional evaluation (http://www.refocusinstitute.com/Refocusservices.html). This was my primary occupation for the past 2 years (past 6 years if you count when I was an independent sub-contractor before setting up officially on my own), but will now be my side job as I take on the job of COO for a new nonprofit focusing on housing homeless families.

2. What is your disciplinary background?

Asia-Pacific Studies (Ph.D.), Public Administration (MSc), International Relations/ Psychology (BA)

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

I have been conducting academic, personnel, and administrative evaluations since 2004. I have been an evaluation consultant since 2006 and a fully independent contractor since 2010.

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

I work mostly in qualitative methods, especially arts-based visual methods, but part of the services I offer include pairing these highly qualitative types of data with quantitative analysis through coding or parallel analyses.

5. What was your favorite evaluation experience?

My favorite evaluation experience came while I was working as a trainer for the JICA-Nepal Strengthening of Monitoring and Evaluation Systems (SMES) program. The trainings were similar to others I had been involved with, including lectures, discussions, and field trips; however, the results of the training were more impacting because it served as a training of trainers that worked to build evaluation capacity and establish the practice of evaluation throughout all of the government agencies in Nepal.

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

I was pilot testing some participatory action evaluation techniques, including three dimensional mural bases and sculptures, in an outdoor venue on a day that was unusually windy. Many of the installations were destroyed and I ended up spending a lot of time reassembling and securing the remaining installations, which took away from potential pitch and participation time. This insult was added to the injury that no participants brought items to contribute to the sculpture. I'm hoping for better results next time!

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

I work with stickers (thanks for the idea Lynn Paleo!), markers, paint, stamps, and sticky notes often and the funniest part is convincing adults that it's ok to indulge their inner child.

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

I'm a personal trainer, boxer, and Zumba instructor. It gets me (and my daughter) out of the house and away from my desk (home office) for the morning.

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

I've become quite fond of the impact social media has on my business (please feel free to check out my Facebook, Twitter, Pinterest and Blog) and I love helping other independent consultants get started using them, so please feel free to ask me any questions or visit during the fall conference at the *Meet the Pros: Intermediate Consulting Skill-Building Workshop*.

FAQs and What to Do About Them!

By Gail V. Barrington from Chapter 17 in her 2012 book *Consulting Start-up & Management: A Guide for Evaluators & Applied Researchers.* Los Angeles: SAGE

Question: How can I be a better time manager?

Answer: Who isn't walking, talking, and checking their i-phones these days? How about the guy who was texting, holding a pizza box, eating the pizza, and driving his truck all at the same time? Multi-tasking has become an art form, but do we really have less time and more to do or are we just getting worse at managing time? Maybe time management isn't about managing time at all—maybe it's about managing work.

Strategies:

Plan. Feeling overwhelmed comes from a lack of planning, so use a rolling plan for your month, week, and day. Mind mapping software is fun and doesn't feel like work. Include personal and work activities to check on your work-life balance. Once you see your tasks in print, it is amazing how easily things happen. No further decision making is required—you already know what you need to do.

Delegate. Delegate tasks that are time-consuming, repetitive, that you don't have the skills for, or are cheaper for someone else to do. Free yourself for what you do best.

Prepare. Get your materials and files organized but don't actually start to work. It is reassuring to know that you don't have to start right now. Just getting ready puts your mind at ease. When tomorrow or Monday comes, you will slide into the work without effort.

Prioritize. When you face conflicting demands, use these three lenses:

Time. If the deadline for one project is sooner than another's, do it now.

Money. If you will make more money doing one activity rather than another, do it now. Your business health is at stake.

Impact. Think about the domino effect. What dominos will fall if you don't do it now?

Show up. The discipline of sitting down at your computer is often enough to get you started. Establish regular work patterns to feel more in control. Save Facebook for later. Right now you have work to do!

Celebrate. Keep a file of letters, cards, positive messages, and news clippings that relate to your efforts. Value your accomplishments.

Endless Institutions Networking in a Program: How Can Evaluators Focus on How the Network Functions?

By Ana García-Femenía
Independent Consultant, Madrid, Spain

The 2012 European Evaluation Society Conference will take place in Helsinki from 3th to 5th October, and will focus on *The Evaluation in the Networked Society: New Concepts, New Challenges, New Solutions.* Since unfortunately I will not be attending the AEA Conference in Minneapolis this year–which I really regret! I am pleased to share with you my contribution to the above mentioned European Evaluation Conference.

Programs funded by international donors in the field of cooperation for development usually involve a huge number of countries and a wide array of institutions and organizations that are supposed to build networks among them and *work in a networking framework*.

These networks do not necessarily have to be defined from the beginning; in fact, they spread and grow as the program develops. The implication of these networks and their development over the program itself is difficult to measure. Evaluators often face the following question: *But.....Who is really in the program? Where does the program end? Who does what?*

Recently I had the opportunity to be a member of the team that evaluated two complex programs by the European Commission in Latin America. Both promoted social cohesion and territorial cohesion (respectively) in 18 countries. They had an approximate budget of 50 million euro and involved at least 100 institutions each in Europe and in Latin America.

What are the implications of having such a huge number of institutions networking in a program that deals with the policy-making process (EU Cooperation for Development policy is supporting public policy making in the region)?

There is a tendency for staff managers and donors to focus on the results of the program, the specific policies the program tries to achieve. But very often the results of the program vary depending on how the different institutions relate to each other, depending on HOW the program works more than on WHAT the program does.

In the above mentioned cases, the evaluation paid attention to the implementation methodologies of both programs. The evaluations tried to analyze the problems of implementation (methodological approach, institutional setup, organization of activities, etc.).

Focusing on the working methodologies and institutional relationships allowed the evaluation to meet the challenges of the different networks. It also helped the program to understand the difficulties of defining their own boundaries.

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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.

Check out our updated website!
Independent Consulting TIG website

NEW: IC TIG on Facebook

Review of Gail Barrington's 2012 *Consulting Start-up and Management: A Guide for Evaluators and Applied Researchers*

By Sean Little
Sean Little Consulting
Ft. Lauderdale, FL

The education of evaluation consultants typically emphasizes evaluation skills at the expense of business skills. Barrington wrote this book to address that skill deficit and largely succeeds, within a 294-page introductory text. As this anorexic financial recovery has pushed some of us, ready or not, into consulting, this book should find a ready audience.

Barrington discusses many complex business issues and provides tools for managing them. Only three are discussed here: the recovery rate, time management, and knowledge management.

Recovery Rate

The recovery rate forms the single most important business metric for consultants to understand. This rate measures the ratio of billable time to the sum of billable and non-billable time in a time period. Billable time refers to time spent in activities that can be charged to a specific client and linked to a contracted budget category; non-billable time refers to time spent in other activities, such as marketing services, writing proposals, and managing accounts.

Time Management

Barrington's time management system has these major functions: 1) to document the amount of time spent on particular activities; 2) to calculate the recovery rate; 3) to identify those activities that absorb too much time; 4) to identify those activities that need more time; and 5) to improve one's ability to develop budgets by comparing estimated time to actual expended time.

Knowledge Management

While many of us have heard the term *knowledge management*, fewer of us have a clear idea what it is or how it relates to our work. Barrington clarifies this "fuzzy" buzzword. She divides knowledge management into four categories:

- knowledge generation
- knowledge capture
- knowledge retrieval.
- knowledge translation

My three-month-old copy is "dog-eared" from constantly referring to it. And I haven't even started developing a marketing or business plan. When I do, I will probably have to buy another copy, a sure mark of a very useful book.

[This is an edited version of a longer review that appeared in the Southeast Evaluation Association newsletter. To read this review, please visit http://southeastevaluation.org/yahoo_site_admin/assets/docs/SEA_Newsletter_May_2012.14194711.pdf, pages 8-9].

"What gets us into trouble is not what we don't know; it's what we know for sure that just ain't so."
Mark Twain