

Winter 2011

Independent Consultants TIG Newsletter

Message from the Outgoing TIG Chair

2010 has been a very active year for the TIG leadership and I would like to take this opportunity to thank the leadership team. Rita Fierro and Michelle Baron did an outstanding job as Program Co-Chairs. This year the Independent Consulting TIG sponsored 11 sessions in San Antonio with a nice mix of topics, including sessions devoted to the business aspects of being an independent consultant as well as sessions showcasing the work done by independent consultants. I would also like to thank our webmasters Stephen Maack and Geri Peak for all their hard work on our new website, which can be accessed from a link on the AEA website (<http://comm.eval.org/EVAL/IndependentConsulting/Home/Default.aspx>)

A priority for me as TIG Chair was to create a group of "virtual colleagues" to help reduce the isolation that independent consultants often face as sole proprietors of small businesses. The idea was to create a cadre of independent consultants who would volunteer to share their expertise with other independent consultants on a

pro bono basis. People who work in large organizations have the ability to knock on a colleague's door to get help with an evaluation question. Now members of our TIG can go to our website to find other independent consultants who are willing to spend a little time to help you out. If you would like to share your expertise, please contact Norma Martinez-Rubin, the incoming 2011 TIG Chair. And many thanks to those of you who have already volunteered to be a virtual colleague.

The strength and utility of our TIG is due entirely to its active membership. It's not just about seeing old friends at the annual AEA meeting, but also about staying connected throughout the year. There are many opportunities to help one another, to learn from one another, and to collaborate with one another.

I've enjoyed serving as your Chair this past year and look forward to seeing you all soon. Best wishes for a happy and prosperous new year.



Fred Glantz
2010 IC TIG Chair

Sincerely,

Fred Glantz
2010 TIG Chair

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So, What's Up With You?

The IC TIG newsletter will now be published four times each year and we need your help!

We would like to feature the work of our colleagues, to share information about successes, and to make this newsletter a vehicle for communicating with one

another.

Please feel free to submit short articles, send us a note about an upcoming event, or drop us a line with ideas.

Deadlines for 2011 are February 28, May 31, August 31, and November 30.

Please send submissions to your newsletter editors:

Susan Wolfe at susan.wolfe@susanwolfeandassociates.net

and/or MaryLynn Quartaroli at Maryllynn.Quartaroli@nau.edu



Meet an IC TIG Member

Each quarter we will feature an IC TIG member in this newsletter. Send your suggestions for future interviewees to Susan Wolfe susan.wolfe@susanwolfeandassociates.net

Norma Martinez-Rubin, 2011 TIG Chair

“I feel privileged to be in front of people whose input may be used to inform program improvements or future direction.”



Norma Martinez-Rubin
2011 IC TIG Chair

Please describe your independent consulting practice. Are you a sole proprietor? I am a sole proprietor of Evaluation Focused Consulting, a consulting practice that offers services to foundations, nonprofits, and corporations with community-benefit interests. I went “independent” in 2004.

Is this 100% what you do, or something you do on the side from another job? Having gradually built the practice in the past 5 years, I felt the scarcity of requests for evaluation proposals and/or projects of interest in 2010. I took on a temporary full-time position this year.

What is the primary and secondary focus of your work? My formal training is in public health (MPH) and business administration (MBA), two very applied degrees that exposed me to Behavioral Sciences/Health Education, Population, Family, and International Health and Strategic Management. Health program evaluation is a second career focus. Another focus is evaluation of health-related projects or programs designed for Latino or immigrant communities.

Are you primarily qualitative, primarily quantitative, mixed methods? Which do you prefer? I apply mixed methods with

evaluation study designs, but my strength is in qualitative methods. I need to call upon someone who absolutely l-o-v-e-s statistics and quantitative data analysis when an evaluation project requires that. I have been the lead consultant on past projects, but am available to collaborate with others as part of an evaluation team for programs with community health objectives.

What was your favorite evaluation experience? Among my favorite evaluation-related experiences is data collection through focus group facilitation. I feel privileged to be in front of people whose input may be used to inform program improvements or future direction.

What type of experience have you had that was less than ideal? A less than ideal evaluation experience is not hearing from clients after report submittal. It has become incumbent upon me to be diligent about following up for feedback to get a sense of whether what I reported was helpful or met their expectations.

Have you had any comical experiences? A comical experience was an “unintended consequence” of data collection while in the field. On a project related to childhood obesity prevention, I inadvertently ended

up losing a few pounds after a couple of two heavily scheduled weeks of multiple focus group facilitation across four counties in Southern California. Lesson learned: Don’t get so busy that you forget to enjoy a meal!

What do you like to do when you're not evaluating? When not focused on evaluation-related tasks, I am usually reading in preparation for volunteer assignments. I am on my city’s planning commission and community emergency response team. In between, I like to craft bead jewelry, peruse my AEA journals, catch up on calls to family members, or plot a few dates with my husband who has introduced me to jazz and baseball from which I occasionally draw analogies to explain planning and evaluation to non-evaluators!

Is there anything else your peers should know about you? I am very pleased to have joined a circle of colleagues who share a knack for keen observation, seem restless about the inertia of organizations, who dare to continually explore and learn, and who are genuinely good, caring people interested in applying what they know in order that their livelihoods make a difference.

Maintaining Quality When Working Alone

Gail Barrington, Amy Germuth, Fred Glantz, Deborah Levy, Michelle Baron, and Susan Wolfe presented a panel discussion at the last IC TIG session of the AEA conference in San Antonio, during which they shared information about the ways they maintain quality in their work in the absence of co-workers to double check things. Here are a few suggestions they offered.

- Conduct an evaluation "post mortem" where you formally analyze the success and

failures of the project. The two-step process described included getting feedback from persons involved in the project and bringing them together to share what they thought and discuss lessons learned.

- Give and get help from your buddies. Bartering with colleagues to review each other's work can be a great way to gain a second set of eyeballs.
- Avoid getting in over your

head. Don't take on work if you do not have the time or expertise to do it well. If you're missing only one skill, then consider hiring a subcontractor for that piece of the work. Deal with problems promptly. If you find a problem before your client has, fix it, don't hide it.

- Develop a standard way to electronically file all of the paperwork from each project. As you organize your evidence into your files, go through each line of your



report and check it against the supporting evidence to make sure it is written correctly. Use the comments feature to document where that piece of evidence can be found in your electronic files.

Virtual Colleagues to the Rescue

So far, seven TIG members have agreed to act as "Virtual Colleagues" for the Independent Consulting TIG.

So, what is a "Virtual Colleague" and what do they have to offer?

Simply put, they are ICs who are willing to offer you their assistance when you need some feedback, ideas, or know-how.

The Virtual Colleagues list will be posted soon on the AEA IC TIG website under TIG Resources. The first group of 7 volunteers were described in the September 2010 IC TIG newsletter.

Their expertise includes logic modeling, data collection, evaluation design, instrument

development, community engagement, review and feedback, and a wealth of other skills and bodies of knowledge.

Next time you're working on an evaluation plan, a proposal, or a report and feel stuck, look up a virtual colleague and send them an e-mail. They're happy to help!

*Need expert advice?
Look up a virtual
colleague and send
them an email.
They're happy to help!*

[IC TIG website](#)

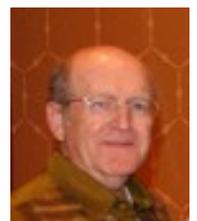
Rugh Receives 2010 AEA Eval Practice Award

Jim Rugh, who has been working as an independent evaluation consultant since his retirement from full-time work in 2007, was the recipient of AEA's Alva and Gunnar Myrdal Evaluation Practice Award for 2010. He has a long history of service to AEA, including helping to found the AEA's

International and Cross-Cultural Evaluation TIG and serving as AEA's representative to the International Organization for Cooperation in Evaluation. He has worked professionally in rural community development in Africa, Asia, Appalachia and other parts of the world for more than 45 years. He co-authored

Real World Evaluation: Working under Budget, Time, Data and Political Constraints with Michael Bamberger and Linda Mabry, which was published in 2006 by Sage.

For more information about Jim Rugh and this award, see the [November 2010 AEA Newsletter](#).



Jim Rugh, recipient of AEA's 2010 Alva and Gunnar Myrdal Evaluation Practice Award

2011 TIG Chair

Norma Martinez-Rubin
Evaluation Focused Consulting
Norma@EvaluationFocused.com

2011 Program Co-Chairs

Rita S. Fierro
Independent Research and Evaluation
Consultant
fierro.evaluation@gmail.com

Deborah Levy
SuccessLinks, LLC
debklevy@successlinks.biz

Susan M. Wolfe
Susan Wolfe and Associates, LLC
Susan.wolfe@susanwolfeandassociates.net

2011 Webmasters

Stephen Maack
Reap Change Consultants
consultant@reapchange.com

Geri Lynn Peak
Two Gems Consulting Services
geri@twogemsconsulting.com

The Independent Consultants (IC) Topical Interest Group (TIG) 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. Please review the complete mission statement at the website and send your comments and suggestions to the TIG chair.

IC TIG MISSION STATEMENT IN BRIEF (DRAFT)

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

[Independent Consultants TIG website](#)

Peer Review of Reports Initiative

Many of us work alone and do not have in-office colleagues to review our reports. In response to this need, the IC TIG developed the Peer Review process for evaluation reports. The IC TIG's Peer Review Process is a professional development initiative intended to provide TIG members with useful feedback on their written work.

TIG members are invited to submit evaluation reports that either (1) are in development for a client, or (2) have already been delivered to the client. In the latter case, feedback can be used to improve future reports.

Peer reviewers are asked to complete their reviews within one week and return them to the coordinators. If your report is especially long or complex it may take a few additional days to complete the review. After the coordinators receive your reviews from the peer reviewers, they will spend a couple of days reading them to make sure their comments are clear, to ask questions of the

peer reviewers, and compile their comments for you. The entire process takes about three weeks to complete.

Reviewers use a structured rubric to conduct their reviews, so the review and feedback is structured for consistency. Where applicable, they will review the program description, evaluation methodology, findings, conclusions/recommendations, overall quality of the writing and presentation, and provide general comments. When your reviews are sent to you, the coordinators also send you a brief set of debriefing questions to get feedback on how the process worked for you and whether the reviewers' comments were useful.

More information on the [Peer Review process](#) can be found in the AEA library, posted by Sally Bond. The information includes the guidelines for submitting reports for review, the rating rubric, guidelines for reviewers, and a cover sheet.

IC TIG Evening Out in San Antonio



The IC TIG members (L-R) Steve Maack, Fred Glantz (2010 TIG Chair), Gail Barrington, and Norma Martinez-Rubin (2011 TIG Chair) enjoyed an evening out following the TIG business meeting at the 2011 AEA Conference. [photo by Loretta Kelley]

La Fogata, a renowned local eatery, sent a van to the conference hotel and transported attendees to this neighborhood-based establishment. Members enjoyed potent margaritas, table side guacamole, and a number of authentic, home style Mexican dishes in a relaxed setting. Steve Maack volunteered to arrange next year's evening out and would welcome your suggestions!