MEET THE PROS: INTERMEDIATE CONSULTING SKILLS SELF-HELP FAIR
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How to Use Sub-Contractors and How to be a Useful Subcontractor: Jennifer Dewey
Branding for the Independent Consultant: Stephanie Evergreen
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HOW TO USE SUBCONTRACTORS AND HOW TO BE A USEFUL SUBCONTRACTOR

Why is this topic important?

Your ability to effectively partner with organizations and individuals on work at national, state, and local levels contributes to your reputation (and income).

Evaluation consulting organizations receive business from Federal, state, and local-level entities. Large and small organizations often partner with subcontractors and consultants to respond to requests for proposals, or RFPs.

"Prime" responders (those who will take 51% or more of the work) look to subcontractors (an organization) and independent consultants (an individual) to enhance their bids. Subcontractors and consultants do this by providing content or technical knowledge that the prime doesn't have enough of, or doesn't have at all.

What do you need to know?

Topic	Sub-topic	Skills/knowledge required	Your advice
Generating Partnerships	Who You Already Know New People to Know	Keep the door open for existing partners (e.g., former organizations, graduate school contacts, etc.) Network for new opportunities	Many partnerships are generated through networking, where a prime representative knows an independent consultant or staff member at a potential subcontractor that can bring the needed knowledge and skills to an RFP response.
What's Out There	Federal Contract Vehicles State and Local Contracting Opportunities	Knowledge of Federal, State, and Local contracting vehicles and opportunities	Familiarize yourself with available Federal contract vehicles to learn about past and future contracts. Consulting organizations list their contract vehicles on their website, along with local projects and funders.
Who You Are	Marketing Yourself How to Be Found	Establish your niche through a recognizable body of work Be Google-able	Subcontractors and consultants may enhance a bid through: • History of working with certain populations (e.g. military and veterans, indigenous peoples) • Specialized statistical expertise (e.g., social network analysis) • Other skill sets (e.g., implementation, dissemination) • Being based in one or more locations where the project will take place, bringing their knowledge of the local government, population(s), and community structure to the work. Make yourself and/or your organization easy to find through LinkedIn profiles with direct contact information, and websites

Topic	Sub-topic	Skills/knowledge required	Your advice
			with detailed descriptions of services, projects, and staff member qualifications. Prime organizations will use this to search and verify partners, and may draw from this information in crafting personnel qualifications and organizational capacity sections. The prime may not know you well or at all, they just know of you and your work. In those cases, your reputation can be enough, but it's not worth much if no one can find you.
Getting the Work	Planning Versus Doing	Brainstorming and idea generation Writing to RFP requirements and evaluation criteria	Leverage your unique subject matter expertise and technical knowledge by being a thinking partner with the prime, helping them understand and work through the challenges implicit in the project. As requested, follow up with well-written tasks that address RFP requirements and evaluation criteria within the allotted page count. Provide professional bios, resumes, project examples, and organizational capacity statements per the prime's timeline and in the requested format. Your inability to provide your brainpower and deliver needed materials may result in a reduced role on the project or no role at all.

Implications for practice/ other important thoughts

Primes view subcontractor and independent consultant contributions to the RFP process as a litmus test for contract performance. Whether the bid is won or lost, high performance will increase your opportunities for future work.

Background on you and your firm
Jennifer Dewey has over 20 years of experience in evaluation, applied research, training, and technical assistance. Her work has focused on child welfare, children's mental health, and K-12 education. Dr. Dewey has held technical and management positions at James Bell Associates, Inc., ICF Macro, Learning Point Associates (now American Institutes for Research), and Andersen. She is currently a Senior Director at Walter R. McDonald & Associates, Inc. (WRMA), a Small Business (SB) headquartered in Arlington, VA, with over 35 years of corporate experience in understanding the policies, practices, research, and information technology that apply to health and human services agencies in the United States. WRMA combines social science research and evaluation capabilities with innovative information systems and technological expertise, providing services to Federal, State, and local governmental agencies; private and not-for-profit organizations; national associations and consortia; and foundations. Dr. Dewey has published in multiple peer-reviewed journals, conducted trainings for the American Evaluation Association (AEA) and Centers for Disease Control and Prevention (CDC), and made over 55 conference presentations. She is a six-time Examiner / Senior Examiner for the Malcolm Baldrige National Quality Award. She can be reached at jdewey@wrma.com and (301) 881-2590 x30292.

Resources:

- Agency for Healthcare Research and Quality (AHRQ), www.ahrq.gov
- Centers for Disease Control and Prevention (CDC), www.cdc.gov
- General Services Administration Mission Oriented Business Integrated Services (GSA MOBIS), www.gsa.gov
- Department of Health and Human Services Program Support Center (HHS PSC), www.ngsservices.com/program_support_center.html
- Health Resources and Service Administration (HRSA), www.hrsa.gov
- Substance Abuse and Mental Health Services Administration (SAMHSA), www.samhsa.gov

BRANDING FOR THE INDEPENDENT CONSULTANT

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WE HAVE A REPUTATION FOR ____.

WE WANT A REPUTATION FOR ____.

BASIC

Your own fonts (one for headings, one for body copy, maybe a third condensed font for graphs)

Your own color scheme

A sexy logo

Business cards (for all)

Thank you / Holiday cards

Consistent staff photos

RESOURCES

Font Squirrel

"Beyond Calibri"

Design-Seeds

Upwork

Moo

INTERMEDIATE

Graphic styles (be specific about images and details—think square vs. rounded corners)

Data visualization styles

Social media (Twitter, Facebook, LinkedIn or something else? All mean something)

RESOURCES

Style sheet template on my site

Big Mouth Marketing Guide to Getting Started on Twitter

ADVANCED

Voice (your written and in-person presence)

Delivery (paper or digital)

Your personal look

Swag

Process or Procedure

RESOURCES

"Moving from paper to digital"

RightSleeve

90 Day Cash Flow Planning

Tamara Hamai, Hamai Consulting

Ever since adopting the Book Yourself Solid system (created by Michael Port), I've benefited from 90 Day Planning to stabilize my cash flow and work load. Follow this worksheet to go through the process.

Desired Outcome #1: Earn enough revenue to cover 90 days of expenses.
Desired Outcome #2: Have enough in savings to cover 90 days of expenses, and earn enough revenue to cover expenses for the following 90 days (i.e., have the money in the bank for this quarter, and earn next quarter's revenue now).

Step 1: Money and Sales

Your known and projected expenses for the next 90 days: ____________
Revenue required to cover those expenses, plus savings: ____________
Service you sell:
____
Price of a single service unit: ____________
Number of sales required to reach your revenue target: ____________

Step 2: Marketing

Your most successful method of converting leads to sales:
____
Conversion rate of that sales method: ____________
Number of leads required to make target number of sales: ____________
2 selected marketing strategies to generate leads:
____
Extra credit: Consider the conversion rates of your marketing efforts. How much of your marketing strategies do you need to engage in to generate the number of leads required to make your target number of sales?

Step 3: Systems

System selected to improve the efficiency and effectiveness of your business:
____
What are the problems with the system or how could it improve?
____
What actions must you take to improve the system?
____

Step 4: Daily Action Plan

- Create a daily action plan. Identify your tasks for each day for all 90 days.
- List out all of the tasks necessary to complete when implementing the marketing, sales, and systems you outlined above.
- Schedule each task, and set deadlines for key milestones.
- Every day complete the items on your to-do list before doing any other work.

Step 5: Evaluating and Learning

- Review your successes and lessons learned at the end of the 90-day period.
- Did you hit your revenue target? Did you stay on budget with expenses?
- What worked well that you should continue?
- What systems need improvement in what ways?
- Use your 90-day experience to plan the next 90 days.

Questions? Get in touch with Tamara at tamara@hamaiconsulting.com.
https://www.tamarahamai.com

Networking Strategies to Grow Business

Networking is vital to growing a business, but it doesn't come naturally to many of us. By gaining a better understanding of what successful sales and networking looks like (hint: it's time to let go of the 1950s used car salesman stereotype) and building our skills in the right areas, even the most introverted among us can tackle it.

Sales (and Networking) in the 21st Century

In his book, To Sell is Human, Dan Pink writes: "Selling in all its dimensions – whether pushing Buicks on a car lot or pitching ideas in a meeting – has changed more in the last ten years than it did over the previous hundred." He argues that because we live in a world where we have a mountain of information at our fingertips, sellers no longer have a knowledge advantage over buyers. For example, after just a few minutes of searching online, a buyer knows what features are available and about how much she should be paying for that new Honda Civic before she even walks onto the car lot and interacts with a salesperson. As a result, stereotypical and antiquated approaches to sales, like being pushy, manipulative, phony, aren't effective anymore.

Selling, and the use of networking as a sales strategy, has become more about <u>connecting, sharing, and building strong relationships with people over time</u>. Instead of asking: How can I push my agenda? How can I get or keep the attention on myself? We need to ask: What can I give and offer to others? How can I help others to be successful? How can I start and continue friendly conversations? How can I put others at ease? How can I listen attentively?

When I learned that networking was less about closing deals and more about meeting new people, developing friendships, and sharing myself and my work with those friends (without worrying about when or if they're going to hire me), it became a lot easier to do.

The Meet Cute: Connecting instead of Networking

Now, you're at a networking event, and you have a new frame of reference for what sales is all about. It still takes work, but the pressure is off. You don't need to close a deal. You just need to meet and get to know some cool new people. Here are a few tips for doing so:

- Don't be afraid to go up to new people and introduce yourself
- Relax and be yourself
- Smile and be friendly; make eye contact
- Wear clothes that you're comfortable in
- Ask questions; find out about their work, their hobbies, their family
- Share; let them learn about your work (and your passion for it), your hobbies, your family
- Ask for a business card and jot notes about the person on the card

Beyond the First Date: Building Relationships of Trust

It's highly unlikely that you'll meet someone at a networking event who needs your services at that time, is in a position to hire you, and trusts you enough to do so. So, that first meeting is just the beginning. You'll need to keep in touch and work on building a relationship of trust over time. Whether it's through email, newsletters, phone calls, over lunch, or over coffee, remember to follow up, follow up, and follow up some more. I usually try to check in with people a couple times a year. When I do, I think about how I can share in one of these three ways:

- Share connections. Who can I connect this person to?
- Share information. What tools, resources, articles, or other interesting information would be helpful for this person?
- Share how I feel. Last time we chatted, the person mentioned that she was struggling with a tough cold. Is she feeling better?

  Reference: These tips come from Michael Port's *Book Yourself Solid.*

Remember, you'll need to keep track of people as you're developing relationships with them. I recommend using Excel or an online program to track contacts and make note of interactions you've had with them.

Avenues for Growth

As you're meeting new people and building relationships, don't forget to explore these avenues:

Ask for referrals from current and past clients	When a current or past client thanks you for work well done, or asks for more services, don't be afraid to ask them to make referrals. It can be something as simple as: "I'm glad you like my work, I enjoy working with you as well. If you know others who may need similar support, please let them know about me."
Reach out to your colleagues	Maintain relationships with professionals that you've worked with in the past. Share knowledge and information and let them know when looking for new opportunities.
Connect with evaluation consultants	They can provide valuable resources, knowledge, and information and you may be able to partner with them on future projects.
Connect with your professional organizations	Become a member of professional organizations like AEA and get involved in events and activities. It's a great way to meet new people in your field.
Connect with your potential client's professional organizations	Find local public health or education associations or local nonprofit hubs and get involved in their events and activities. You'll meet new people and get a better sense of the context in which your client's work.
Meet others who work with your potential clients	You can learn a lot about your potential clients and their needs by connecting with people who provide other types of services (e.g., grant writing, marketing, strategic planning, fundraising). By building trust with people in this group, you also open up opportunities for referrals and/or collaborations.
Host your own events	Bring people together so they can share with and learn from you and others in your network.

Resources

Books
Book Yourself Solid by Michael Port
To Sell is Human: The Surprising Truth about Moving Others by Daniel Pink
Consulting Start-Up and Management: A Guide for Evaluators and Applied Researchers by Gail Barrington

Articles
http://www.humanresources.com/617/10-essential-networking-strategies
http://smallbusiness.chron.com/five-strategies-networking-21564.html
https://hbr.org/2014/08/networking-for-introverts

About Laura

My name is Laura Keene and I've been Owner & Principal at Keene Insights since 2012. I'm based in sunny Los Angeles, CA. I provide evaluation training and support to non-profits, foundations, government agencies, and other community-based organizations. I have more than a decade of experience designing and implementing evaluations and building organizational capacity around evaluation. I'm definitely a generalist, working in public health, healthcare, social services, and education in local, national, and international settings. I have an undergraduate degree in Psychology from UC Berkeley and a Master of Public Health (MPH) from Columbia University.

If you have any questions, please feel free to call or write any time! I love chatting with other evaluation consultants.
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EVOLVING FROM A SOLE PROPRIETORSHIP TO A SMALL SHOP

Why is this topic important?

Those of us who call ourselves independent consultants often start out as sole-proprietors, handling handle most or all aspects of client evaluation needs ourselves. But often, we reach a point when forming a small team makes sense. Do you consistently turn down appealing projects because your plate is full? Do you still love being a consultant, but are burning out on certain aspects of evaluation projects and would love to hand them off to a less road-weary teammate? Are you being invited to submit bids for larger projects that simply require multiple hands on deck? Do you need someone to complete administrative tasks at a more reasonable rate than what you bill for your time? Do you wish for a colleague that you can turn to and discuss a tricky project with? *Then it's time to consider adding to the size of your team.*

What do you need to know?

Topic	Sub-topic	Advice!
Making the choice	The Considerations The Role of Your Gut	• Review this topic list too see many (but not all) of the considerations and work involved with becoming a small shop. • Know the choice isn't completely rationale, and biggest isn't necessarily better!
Finding the right teammates	Contractors -> Part Timers -> Full Time Employees Recruitment and Training	• Growing your team can be gradual. Start with subcontractor or hire a part-timer. Over time, this set up can evolve to include full time employees. • Your open position can be very appealing and easy to recruit to fill. *Program Evaluation*, *Consultant* are both terms that will attract interest, as do many mission-based content areas. • There is no shortage of talent seeking meaningful part-time or flexible employment. Consider local graduate programs. Or hire a skilled mid-career professional with young children. Or seek an artist, community activist, or athletes hoping for flexible hours.
Creating systems, policies and procedures	Formalizing your Practice to Foster Consistent Quality Division of Labor	• A challenge lies in insuring that the quality of your work remains high while you train and empower others to do that work. Invest time in documenting *how* you do your work, with a focus on the process and systems. • Identify tasks that are most easily transferred to others and think about how to best train staff.
Minimizing risk	Corporate Structure HR Polices and Employee Manuals Insurance Legal Advice	• Invest in legal and HR advice up front to minimize risk. Often this is a one-time cost. • Consider becoming an LLC or corporation. • Update your liability and E&O insurance. • If you haven't already, consider a payroll service or trustworthy bookkeeper.
Planning for a healthy cash flow	Project Budgeting Billing Rates Wages and Payroll	• Know that your rates and overall cost to clients may go up. More of your time will be spent on unbillable management, internal communication and administration, and the lost income needs to be made up. Overhead (beyond payroll) will increase (e.g., computer, office supplies, insurance costs.) • Plan to bill your clients *at least* twice the hourly rate you pay your staff to cover overhead and unbillable time.
Addressing logistics	Office Space, Materials Communication Time Tracking	• Determine if you can still work from home with employees (I do!), or if new office space is needed. • Set aside regular time for communication about projects with staff – the work that used to happen when you talked to yourself while in the shower or driving now requires time on your calendar. • Use online tools to help the team communicate and track time.

What tools do you need to have?

Project Management Software for Teams, such as Asana.com
Time Tracking Software, such as Freckle.com
Payroll Service (such as Paychex or ADT or a small local company) or a great bookkeeper
Online Recruitment Sites, including local universities, Idealist.org and others

Implications for practice/ other important thoughts

While it's important to consider the costs and complexities associated with becoming a team, it's also important that you simply listen to your gut: because what independent consultant entered this line of work for completely rational reasons? There is a similar leap of faith involved when you first grow beyond sole proprietorship. Just as you have successfully navigated jumping into the consultant pool, so too can you create a thriving small shop with a strong team that you enjoy. To minimize risks and stresses, consider evolving slowly and creatively. Know that you can course-correct and adjust if anything doesn't work the way you first try it.

About MEMconsultants, LLC

MEMconsultants, LLC is a Seattle-based consultancy that partners with mission-based organizations working for youth, families and communities. Services include strategic planning, organizational assessment, organizational development and capacity building; program planning, process evaluation and outcome evaluation. MEMconsultants individually customizes long and short term contracts for a variety of national, regional and local organizations, including a mix of nonprofit organizations, grantmaking foundations, socially responsible corporate clients, and public agencies. MEMconsultants' client list includes foundations and intermediary organizations, nonprofits that serve children, youth, and families, community based organizations that partner with schools, and museums with education programming. MEMconsultants prides itself on offering high quality, results-oriented consulting services that are accessible and affordable.

Meet our Team

Principal Consultant Mary Murray created **MEM**consultants in 2001 after times in the roles of teacher, researcher and funder. For the last fifteen years, Mary has worked in the Puget Sound area and nationally with foundations, government agencies, large and small community-based organizations, supporting clients to use evaluation practices to clarify impact and improve program management. Mary has Bachelors in psychology from Haverford College and a Master's Degree in Community & Prevention Research at the University of Illinois. mary@memconsultants.com

Associate Consultant Anne Shukla joined **MEM**consultants as an intern in 2007 while earning a Master's in Arts Leadership from Seattle University. Upon graduation, she elected to keep her Research Assistant role while also working part time as a Field Coordinator for a Westat-led evaluation. She now works primarily at **MEM**consultants and also teaches strategic planning and program evaluation courses for her alma mater.

Associate Consultant Margaret Woley joined **MEM**consultants as a Research in 2008 while earning a Master's in Public Administration from the University of Washington. Once earning her degree, she spent six years working on systems change to address family and youth homelessness, with a focus on measurement, learning, and continuous improvement. She rejoined **MEM**consultants in 2015, after the birth of her first child.

Research Assistant Jordan Alam joined **MEM**consultants in 2016. She is passionate about empowering marginalized voices, and also founded and edits an online Asian American social justice magazine, Project As[I]Am. She completes her week working in a shelter serving the homeless and victims of domestic violence and completing her doula certification.

STRATEGIC/BUSINESS PLANNING FOR BUSINESS STRENGTH & LONGEVITY

Why is this topic important?

Whether you are new to consulting or an experienced pro, using the tools of strategic planning will allow you to be intentional about how you grow and/or strengthen your business.

What do you need to know?

Topic	Sub-topic	Skills/knowledge required	Your advice
Conduct a community or industry scan	Identify changes that are taking place, opportunities that are emerging	Meetings with key people in your community (or industry of effort), including: Leaders/experts in the field, clients, competitors, potential partners	Purpose of the meetings is to get the perspective of others about what is changing in regard to your community, clients, and/or your field of work, and any interesting or emerging opportunities or threats that can inform your consulting goals. Be open-minded during these meetings; your goal is to listen. You can use classic SWOT questions (listed below) to guide these conversations.
Once you have completed your community or industry scan, based on what you learned:			
Set a goal(s) for where you want your business to be in a year.	Where do you want your business to be in one year?	Reflection & Goal setting	Set 1 year goals or 2 year goals at the most, and not more than 3 goals. Things move rapidly and more than one year goals can dilute your ability to shift as needed. Don't forget to identify metrics you can track so that you will know if you have met your goal.
Revise/Sharpen your services or your business pitch to align with your goal(s).	How can you develop/ sharpen your skills to meet opportunities that were identified?	Writing & Research	Make sure to revise any marketing materials related to your consulting practice to reflect your new goals or focus. If your goal is to get in front of potential new clients, research potential contacts at target agencies.
Identify new resources or training needed to meet your goal(s).	Do you need new resources, staff, or partners to meet your goals?	Research	Research professional development opportunities to build new competencies or strengthen your skills related to your goals. Identify potential partners that can help you reach your goals. In many cases, the best partners are people/groups whose skills <u>complement</u>, rather than replicate, your skills.
Start meetings with new business targets.	Given your goal(s), who are the targets you want to engage?	Marketing, Partnership Development, and Communication skills	Generally, potential targets are identified in the scan phase, so this step is intended to launch implementation of your strategy to reach your new goal(s) by pitching new work or partnering toward a specific goal.

What tools do you need to have?

Classic SWOT (**S**trengths/**W**eaknesses/**T**hreats/**O**pportunities) questions can be used to guide conversations in the scan phase. For example:

1. What are the most notable advancements/achievements that have taken place in this (community/industry) in the last year? What do you think was driving those advancements, or what was done to bring about those achievements?

2. What changes are taking place in this (community/industry) that is affecting this (community/industry)? How will those changes impact (the person you are talking to, or the industry)?

3. What aspect of this community/industry do you think can be improved? What is needed to make those improvements?

4. Are there other people or organizations that would be good to talk to? Are there other things/suggestions I should consider in this assessment of the community/industry?

Best Practices

Don't just drift into jobs or projects; be intentional about the work you are taking on and the work you are pitching. Target projects that will help you meet your consulting goals, such as: steady funding (look for multi-year projects), or working on a certain project (meet with people involved in some way with the project) or with a certain client.

Constantly be expanding your reach by meeting with new people/potential business at least once each quarter, if not more regularly. Be intentional about meeting with people who can help you move toward your goals.

Always be connecting what you are learning – in your work or meetings with others – with how you talk about your services and/or the skills you need to develop to move toward your goal.

Background on you and your firm

Jessica Pugil is founder and principal of Working Partner LLC. Founded in 2006, Working Partner is a planning, evaluation, and outreach firm that joins forces with philanthropic, public, and social sector organizations to build the capacity of organizations to solve complex social problems. Our unique mix of planning and evaluation practice is particularly well-suited for multi-organizational, multi-disciplinary collaborations and new initiatives. Through high quality facilitation, evaluation, and outreach approaches, Working Partner enables our clients to engage their community, build a collaboration, design a project, improve a program, and tell the story of their impact in a more powerful way.

Understanding Client Needs: Tips for Independent Consultants

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Do Your Homework.

Prior to meeting with a potential client, aim to learn as much as possible about the organization and broader environment in which it operates. This will demonstrate your credibility and improve the relevance of your proposed evaluation approach. Be systematic about your research process and explore the wide range of information sources available to you, from program documents to relevant industry reports.

Listen.

How can you understand a potential client's needs without giving them the opportunity to tell you? This may sound simple but meaningfully listening without planning a response or thinking about solutions to their challenges can be difficult. Actively listening will show that you are genuinely interested in learning about their organization.

Ask Questions.

Asking thoughtful questions is one of the most valuable tools you have to learn about your potential client. Ask open-ended questions that will help you define the scope of their needs, which will then help you define the rough boundaries for your proposed solutions.

Ongoing Assessment.

Remember that clients' evaluation needs will shift over time. It is critical that you review and respond to their changing needs to ensure that your evaluation findings will actually be used.

Learn From Business.

Evaluation consultants are technical experts, but tend to be less familiar with consulting from a business perspective. Refining our consulting skills can help us better identify our clients' needs, but also equip us with other tools for success. Gail Barrington has produced a range of training resources dedicated to developing consulting skills for evaluators. Check out her resources here: http://tinyurl.com/jgh2rph

catalyst CONSULTING INC.