CONSULTING WITH NON-PROFITS AND COMMUNITY ORGANIZATIONS



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Consulting with Non-Profits and Community Organizations

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1.1: WHY SHOULD YOU BE A CONSULTANT (5 REASONS)

People come to consulting through many different paths. Some arrive early in their careers, and others after years working inside organizations, ready to apply what they have learned. Some discover consulting as a way to combine research, evaluation, and applied problem-solving with a desire for autonomy and flexibility. Others may begin through a project, a referral, or an opportunity that slowly grows into a career. What these paths share is not a single origin story, but a common pull toward work that is practical, purpose-driven, and grounded in real-world impact.

In this chapter, we introduce five reasons people are drawn to consulting and evaluation work and why many find it a sustaining and meaningful career over time. These reasons reflect both enduring motivations and how they show up in today's consulting landscape. As you read, we invite you to consider how these themes resonate with your own experiences, aspirations, and questions. Whether you are exploring consulting for the first time, transitioning from another role, or rethinking your consulting practice, these reasons offer a starting point for reflecting on what draws you to this work and what might keep you engaged in this field.

Consulting and evaluation work with nonprofit and community-based organizations continues to change over time. New tools, new technologies and shifting funding and policy landscapes shape how the work gets done. And yet, when we talked with consultants and reviewed results from a recent survey of consulting and evaluation professionals, we heard consistent and familiar themes. People are still drawn to consulting for many of the same reasons they always have. "the chance to make an impact", "to keep learning", "to grow professionally", "to have flexibility in their home and worklife", and "to exercise a greater degree of choice in their work" than they would have with one employer. What has changed in the past decade is not why people are drawn to consulting, but how those motivations play out across different career stages and consulting models - suggesting that consulting is a way of working and thinking, shaped over time through experience, choice, and practice.

When we asked today's professionals why they chose consulting, they described decisions shaped by timing, values, and experience. For some, consulting offered greater control over their work; for others, it became a way of approaching work and problem-solving more broadly.

> "Consulting gave me more control over how I work, who I work with, and the kinds of problems I want to focus on."

> "Over time, consulting became less about individual projects and more about how I approach work and problem-solving."

Query1.1.1

A Moment to Reflect

What's drawing you to consulting at this point in your career - and what factors might affect that motivation over time?

What kind of flexibility or control are you hoping consulting gives you right now?

How do you hope consulting will shape the way you think about and approach your work? How will your values shape your approach to the work?

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1.1.1: Making Work Matter

There are few better professional rewards for consultants than observing organizations they've partnered with thrive during and after their collaborations. Consulting work feels worthwhile when you are having a role in the improvement of organizations or their programs in the real world. A professor and part-time independent consultant explained that the draw of consulting for him comes from the opportunity to have a positive influence in a context outside of academics. He explained that consulting provides an opportunity to interact with people from a variety of organizations whose work he finds inherently interesting. He sees his consulting work as a way of contributing to the betterment of society.

Findings from the survey reinforce his perspective. Consultants frequently described impact not only in terms of outcomes or deliverables, but in helping organizations clarify decisions, strengthen internal capability, and learn from their work in ways that endure beyond a single project.

> "I assist people in pausing and reflecting on their work and bringing what they learn into planning and decision-making."

While progress is not always visible or quick, consultants across the board cite being able to make a difference - as partners, thought collaborators, and capacity-builders - as a key reason for getting into and remaining in the field.

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1.1.2: Growing through Variety

In addition to being intellectually stimulating, consulting with a variety of organizations requires that you continuously learn. The work is too contextually based to just bring the same solutions to each new situation. Several consultants shared that consulting work forces them to look into and even develop expertise on topics they would not otherwise consider.

Over time, however, many consultants describe this learning less as acquiring new content and more as developing judgement — understanding how to adapt core skills across different organizational contexts, constraints, and needs. While the work can be frustrating at times, it keeps your professional life from stagnating and encourages growth through experience rather than routine.

Consulting also offers opportunities to grow alongside others. Many consultants noted that their learning is often reciprocal and emerges through collaboration with clients and students as they work through complex, real-world challenges together. Several consultants who teach or mentor others observed that these practical experiences enhance their credibility and effectiveness because they draw on a wide range of real-world examples when answering questions and illustrating concepts.

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1.1.3: Gaining Flexibility and Agency

A common characteristic of consulting is that it offers you the opportunity to work in many settings such as on site with clients, at home, in an office, shared working spaces, public spaces, or in transit. Today, consultants describe flexibility not only in terms of where they work, but in the ability to exercise greater agency over their time, availability, priorities, and the kinds of work they choose to engage with.

Several consultants described agency as a primary reason for choosing independent consulting. For some, agency meant having greater control over work schedules and the ability to balance professional commitments with family responsibilities. For others, it meant working from home, avoiding long commutes, and creating conditions that supported their best work. Still others emphasized the freedom to choose clients, projects, and methodological approaches that aligned with their values. Across these stories, consultants consistently described independent consulting as a path toward greater autonomy over both their professional practice and personal lives.

This is consistent with the survey results that indicated roughly 90% of consultants reported working from home. This reflects not simply flexible arrangements, but the degree of agency consultants have in shaping their work.

While working remotely is pretty common these days, we have learned that people who are satisfied with their flexibility over the long term often develop clear routines, establish limits around availability, and deliberately protect time for rest and renewal. Flexibility is not simply a structural benefit of consulting, but a skill set that must be actively cultivated.

Taken together, these accounts highlight agency as the power to decide - over direction, alignment, and professional identity-setting the stage for the next section, which explores how consultants shape the day-to-day design of their work.

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1.1.4: Shaping Your Own Way of Working

Several consultants described consulting as an opportunity to intentionally shape how their work functions on a day-to-day basis, beyond simply having flexibility or independence. They spoke about structuring the rhythm of their work including how projects are scoped, how time is paced across the year, and how professional commitments fit alongside the realities of their personal lives. Rather than operating within predefined organizational systems, consultants described creating their own routines, boundaries, and workflows that support both effectiveness and sustainability.

Many consultants characterized the work as both freeing and challenging. Several noted that stability and confidence increased over time as they established their practices and built strong professional networks. For some, working independently ultimately felt more secure than relying on a traditional employer. As one consultant explained, independent consulting offered a sense of security because “you know you won’t be fired tomorrow.”

Consultants also emphasized the practical and psychological benefits of creating a professional life on their own terms. Some described leaving positions in which they felt underutilized or constrained and pursuing consulting as a way to better align their work with their skills, interests, and aspirations. Many valued the sense of empowerment and control that came from making their own decisions, setting their own schedules, and determining which projects to pursue. Although consulting often involves long hours and uncertainty, respondents consistently described the ability to direct their own work as a significant benefit. They also appreciated avoiding unnecessary bureaucracy, whether that meant fewer approvals for routine decisions or greater authority over how resources, tools, and time were allocated. Across these accounts, consulting emerged as a vehicle for shaping a career that evolves with experience, life stage, and changing priorities.

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2.1: Test Page 1

CHAPTER 1 · SECTION 1.1

People arrive at consulting from very different places. What they share isn't a single origin story, but a pull toward work that is practical, purpose-driven and grounded in real-world impact.

IN THIS SECTION YOU WILL

- Recognize the different paths people take into consulting
- Preview the five reasons people choose consulting and stay with it
- Reflect on what draws you to this work right now

Many paths in

Some people arrive early in their careers. Others come after years inside organizations, ready to apply what they have learned. Some discover consulting as a way to combine research, evaluation and applied problem-solving with a desire for autonomy and flexibility. Others begin with a project, a referral or an opportunity that slowly grows into a career.

Which path sounds most like yours?

Early in my career
Starting out and drawn to consulting from the beginning.

After years inside organizations
Ready to apply what I've learned across many settings.

A blend of research and practice
Combining research, evaluation and problem-solving with more autonomy.

One project that grew
A referral or opportunity that slowly became a career.

The field changes. The reasons don't.

In this chapter, we introduce five reasons people are drawn to consulting and evaluation work, and why many find it a sustaining and meaningful career over time. These reasons reflect both enduring motivations and how they show up in today's consulting landscape. Whether you are exploring consulting for the first time, transitioning from another role, or rethinking your consulting practice, they offer a starting point for reflecting on what draws you to this work and what might keep you engaged.

Consulting and evaluation work with nonprofit and community-based organizations continues to change. Yet when we talked with consultants and reviewed results from a recent survey of consulting and evaluation professionals, we heard consistent and familiar themes.

WHAT HAS CHANGED

- New tools and technologies
- Shifting funding and policy landscapes
- How motivations play out across career stages and consulting models

WHAT HASN'T

- Why people are drawn to consulting in the first place
- The wish for impact, learning, growth, flexibility and choice

Consulting, in other words, is a way of working and thinking, shaped over time through experience, choice and practice.

Five reasons people choose consulting

This chapter explores each of these in depth. As a first pass, **select the ones that resonate with you.** Your picks will appear in the reflection at the end of this section.

1 **Making an impact**
Work that changes something for the organizations and communities you serve.
In their words: "the chance to make an impact"

2 **Continuous learning**
Each client brings new questions, settings and methods.
In their words: "to keep learning"

3 **Professional growth**
Building skills, range and reputation across many projects.
In their words: "to grow professionally"

4 **Flexibility**
More say over when, where and how much you work.
In their words: "to have flexibility in their home and worklife"

5 **Choice and control**
Deciding who you work with and which problems you take on.
In their words: "to exercise a greater degree of choice in their work"

In their own words

When we asked today's professionals why they chose consulting, they described decisions shaped by timing, values and experience. For some, consulting offered greater control over their work; for others, it became a way of approaching work and problem-solving more broadly.

> **Consulting gave me more control over how I work, who I work with, and the kinds of problems I want to focus on.**

> **Over time, consulting became less about individual projects and more about how I approach work and problem-solving.**

REFLECTION 1.1

A Moment to Reflect

Your answers are private. They save automatically in this browser only. Use "Download my reflections" to keep a copy.

1. What's drawing you to consulting at this point in your career, and what factors might affect that motivation over time?

2. What kind of flexibility or control are you hoping consulting gives you right now?

3. How do you hope consulting will shape the way you think about and approach your work? How will your values shape your approach to the work?

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CHAPTER 1 · SECTION 1.1

Many paths. One shared pull.

People arrive at consulting from very different places. What they share isn't a single origin story, but a pull toward work that is practical, purpose-driven and grounded in real-world impact.

IN THIS SECTION YOU WILL

1. Recognize the different paths people take into consulting
2. Distinguish what has changed in consulting from what hasn't
3. Preview five reasons people choose consulting, and reflect on your own

Many paths in

Some people arrive early in their careers. Others come after years inside organizations, ready to apply what they have learned. Some discover consulting as a way to combine research, evaluation and applied problem-solving with a desire for autonomy and flexibility. Others begin with a project, a referral or an opportunity that slowly grows into a career.

TRY IT

Which path sounds most like yours?

1

Early in my career

Starting out and drawn to consulting from the beginning.

2

After years inside organizations

Ready to apply what I've learned across many settings.

3

A blend of research and practice

Combining research, evaluation and problem-solving with more autonomy.

4

One project that grew

A referral or opportunity that slowly became a career.

The field changes. The reasons don't.

In this chapter, we introduce five reasons people are drawn to consulting and evaluation work, and why many find it a sustaining and meaningful career over time. These reasons reflect both enduring motivations and how they show up in today's consulting landscape. Whether you are exploring consulting for the first time, transitioning from another role, or rethinking your consulting practice, they offer a starting point for reflecting on what draws you to this work and what might keep you engaged.

Consulting and evaluation work with nonprofit and community-based organizations continues to change. Yet when we talked with consultants and reviewed results from a recent survey of consulting and evaluation professionals, we heard consistent and familiar themes.

SORT IT OUT

Based on what consultants told us, which of these have changed over the past decade, and which haven't?

Cards to sort

- New tools and technologies
- The chance to make an impact
- The policy landscape
- The wish to keep learning
- Wanting flexibility in home and work life
- The funding landscape
- Wanting more choice in your work
- How motivations play out across career stages and consulting models

Has changed	Hasn't changed

Consulting, in other words, is a way of working and thinking, shaped over time through experience, choice and practice.

Five reasons people choose consulting

This chapter explores five reasons, one in each of the sections that follow.

1.1.1

Making work matter

Seeing your work make a difference for the organizations and communities you serve.

"the chance to make an impact"

1.1.2

Growing through variety

New clients, questions and settings that keep you learning and growing.

"to keep learning," "to grow professionally"

1.1.3

Gaining flexibility and agency

More say over when, where and how you work, and who you work with.

"to exercise a greater degree of choice"

1.1.4

Shaping your own way of working

Building an approach to work and problem-solving that is your own.

1.1.5

Clear indicators of success

Projects with defined goals and endpoints, so you can see what you've accomplished.

MAKE IT YOURS

Right now, which of these matter most to you?

- **Making work matter**
- **Growing through variety**
- **Gaining flexibility and agency**
- **Shaping your own way of working**
- **Clear indicators of success**

In their own words

When we asked today's professionals why they chose consulting, they described decisions shaped by timing, values and experience. For some, consulting offered greater control over their work; for others, it became a way of approaching work and problem-solving more broadly.

> **"Consulting gave me more control over how I work, who I work with, and the kinds of problems I want to focus on."**
>
> Consultant, interview

> **"Over time, consulting became less about individual projects and more about how I approach work and problem-solving."**
>
> Consultant, interview

REFLECTION 1.1 **A Moment to Reflect**

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7.1: Introduction

This chapter introduces the concept of evalpreneurship or evaluation entrepreneurship (Sabarre, 2021)—and explores its connection with Kirton's Adaptation–Innovation (A–I) theory, a problem-solving theory often used to enhance understanding and practice of leadership (Friedel, 2023). Although emerging in the evaluation literature, evalpreneurship highlights that evalpreneurs combine evaluation expertise with the entrepreneurial capacity and resilience needed to build a business and navigate the uncertainty and risks inherent in entrepreneurship (Sabarre, 2021).

As Kirton (2011) emphasizes, all of life is problem solving, and an individual's preferred problem-solving style indicates how they interpret challenges, approach tasks, and respond to change. Understanding these preferences is particularly valuable for consultants and evalpreneurs, who often lead teams, collaborate across diverse perspectives, and serve as agents of change within the evolving evaluation marketplace (Uwitonze, 2025). Drawing on qualitative findings from Uwitonze's (2025) dissertation, this chapter highlights diverse pathways into evalpreneurship and introduces a reflective tool to help professionals locate themselves along the independent consultant–evalpreneur continuum. As the evaluation marketplace continues to evolve, this chapter positions the KAI framework as a practical lens for examining how evaluation professionals navigate Problem A and Problem B, adapt to changing demands, and apply their problem-solving preferences in consulting practice.

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7.2: Why Evalpreneurship May Be Your Career Path

Recently, independent consulting has become an important career path for many evaluation professionals. In 2022, the American Evaluation Association's (AEA) Independent Consulting Topical Interest Group surveyed 270 independent evaluators, 90% of whom were U.S.-based, and found that 60% started independent consulting since 2012, with 26% beginning after 2020. Since 2025, changes in the U.S. administration have reduced demand for evaluation services from government and international development sectors, shifting the evaluation marketplace toward philanthropy, nonprofit organizations, and community-based organizations. For emerging evaluators, this shift highlights the importance of understanding how the field is evolving and where new opportunities are developing. As the market expands in these areas, some evaluation professionals are increasingly becoming entrepreneurial market actors who actively influence how evaluation is defined, commissioned, and applied (Sabarre, 2021). As noted by Sabarre (2021), these entrepreneurs influence both the supply and demand for evaluation services, positioning them as agents of change in the field's ongoing evolution.

These professionals who take this path are often referred to as "evaluation entrepreneurs," or "evalpreneurs." The term evalpreneurship was first introduced in scientific literature by Dr. Nina Sabarre in her 2021 dissertation at Claremont Graduate University, which examined the role of entrepreneurship within the U.S. evaluation marketplace (Sabarre, 2021). As the name suggests, evalpreneurship combines two fields: evaluation and entrepreneurship. Bringing these ideas together, Sabarre (2021) defines ***evalpreneurship*** as:

"The capacity and willingness to develop, organize, manage, and assume the risk of a business that sells evaluation products and services (p.7)."

For emerging evaluators, this concept highlights that evaluation consulting is not only a technical practice but also a business endeavor requiring strategic, managerial, and entrepreneurial competencies alongside evaluation expertise.

To understand more about what **"Evalpreneurship is and what it is not"**, watch the Essentials of Evaluation Entrepreneurship with Nina Sabarre, Ph.D. on YouTube.

What are the skills and competencies needed for evalpreneurs?

To understand more about the needed skills and competencies for evalpreneurs, Barrington (2011) notes in *Consulting Start-Up and Management: A Guide for Evaluators and Applied Researchers* that successful evaluation consulting requires more than technical expertise, encompassing essential business, entrepreneurial, and consulting skills such as marketing, contract management, financial planning, and relationship building. Although not yet extensively detailed in the evaluation literature, the capacities of evalpreneurs may also include higher-level abilities such as creativity, leadership, problem-solving, teamwork, and interpersonal skills (Uwitonze, 2025). These skills, together with specialized knowledge and technical competencies in evaluation, can be developed through formal and informal learning, on-the-job training, and lived experience (Uwitonze, 2025). Understanding this broad set of competencies is an important first step for emerging evaluators in clarifying their own career path.

Where are evalpreneurs found?

Some evaluators may choose to work as independent consultants, focusing primarily on delivering evaluation work directly to clients, while others may choose to build and lead evaluation business(es). By definition, those who found (own) or co-own evaluation business(es) whether for profit or non-profit, are evalpreneurs, and they come in a variety of sizes and structures (Sabarre, 2021). At the largest scale, some lead evaluation firms with over 500 employees, managing complex projects and large teams of consultants, analysts, and managers (Barrington, 2011). Medium-sized firms, typically with 50 to 500 employees, often focus on specialized evaluation services, while smaller "boutique" firms employ fewer than five and up to 50 staff members. These boutique firms are frequently led by sole practitioners or small teams of evalpreneurs with specialized expertise in areas such as program evaluation, policy analysis, or needs assessment. In the U.S., this boutique model is particularly common, often founded by former executives, independent consultants leaving larger firms, professionals offering niche consulting alongside other employment, or university faculty providing evaluation expertise (Barrington, 2011).

How can you know you are an Independent Evaluation Consultant or Evalpreneur?

As noted above, evalpreneurs operate across a wide range of evaluation businesses, from small boutique practices to large firms. However, not every evaluator who works independently is necessarily an evalpreneur. An independent evaluation consultant organizes their practice primarily around their individual expertise, time, and professional capacity, delivering evaluation services directly to clients. An evalpreneur, in contrast, builds and leads a for-profit or nonprofit evaluation firm that creates value beyond their own **direct labor** through people, systems, partnerships, resources, and opportunities for growth.

Table 1 provides a more detailed comparison of these two pathways, including differences in business structure, revenue and capacity, business orientation, delivery, risk, and scalability. These pathways are not necessarily mutually exclusive; evaluators may move between them as their skills, experiences, aspirations, and businesses evolve.

INDEPENDENT EVALUATION CONSULTANT OR EVALPRENEUR? Key differences and similarities	
INDEPENDENT EVALUATION CONSULTANT	**EVALPRENEUR**
Sells expertise and time	Builds an evaluation enterprise Builds a business around evaluation
BUSINESS MODEL	
• Individual practice • Expertise-centered • Personal reputation • Owner-operated	• Evaluation enterprise • Business/system-centered • Company/organizational reputation • Designed for growth and continuity
BUSINESS STRUCTURE	
• Solo / partnership • Individual brand • Flexible structure • Limited hierarchy	• LLC / corporation / formal entity • Company brand • Organizational structure • Roles, systems & processes
REVENUE MODEL & CAPACITY	
• Project/hour based • Billable expertise • Revenue tied to own time • Capacity limited by hours	• Contract/business revenue • Revenue supports growth • Multiple contracts/resources • Capacity extends beyond founder's time
BUSINESS ORIENTATION	
• Engagement-based • Can stop/start • Individual focus • Professional practice	• Enterprise-based • Long-term company focus • Growth, continuity & scalability • Business-building mindset
PEOPLE & DELIVERY	
• Primarily self-delivery • May subcontract • Owner is central	• Team-based delivery • Employees, contractors & partners • Work distributed across team • Systems support delivery
RISK & RESPONSIBILITY	
• Lower overhead • Fewer employees • Individual risk • Smaller fixed costs	• Greater financial/operational risk • Employees/contractors • Team & enterprise risk • Greater investment & responsibility
GROWTH & SCALABILITY	
• Grows mainly through personal capacity • Expertise remains central • Growth tied to own labor	• Builds organizational capacity • Develops systems & assets • Expands markets & services • Business can grow beyond the founder

Figure 7.2.1: Table 1. In-depth distinction between an independent evaluation consultant vs evalpreneur

The remainder of this chapter introduces a reflective practice to help you explore whether you may be better suited to the path of an evalpreneur or independent evaluation consultant. This process will help you reflect on the skills and experiences you already possess, identify areas you may wish to develop, and determine which pathway best aligns with your professional goals and aspirations.

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7.3: Reflective Activity - Exploring Your Consulting Path - Solo, Hybrid, or Entrepreneurial

Now that you have considered different organizational contexts for evaluation consulting, take a moment to reflect on who you are: Independent Consultant or Evalpreneur. This exercise is not a scorecard—there are no right or wrong answers. Instead, it is designed to help you explore your professional identity, work style, and the type of consulting practice that best aligns with your skills, values, and ambitions.

As you move through the prompts below, each one highlights a key dimension of consulting practice. You may find that your responses fall consistently in one category or vary across dimensions; both patterns are common.

1. Client engagement and service delivery.

Begin by considering how you work with clients and deliver services. Do clients hire you primarily for your individual expertise, or for the approach or organization you represent? Are you responsible for completing all work yourself, sharing responsibilities with others, or overseeing the work of a team? Reflect on your practice structure—solo, small team, or multi-person enterprise. Working independently tends to align with an independent consultant orientation, leading others toward an entrepreneurial orientation, and combining both reflects a hybrid position.

2. Income generation and business responsibilities.

Next, consider how your practice generates revenue and how you engage in business management. Do you primarily rely on hourly or project-based fees tied to your own work, or does your practice generate income through a broader team or organizational structure? How comfortable are you with variability in cash flow? Also reflect on the role of business development in your work—occasional, regular, or central. A strong focus on revenue systems and ongoing business development often signals an entrepreneurial orientation, while emphasis on individual project work aligns more with independent consulting.

3. Professional direction and long-term goals.

Now think about your longer-term intentions. Is your priority flexibility and work-life balance, or building a practice that can grow beyond your direct contributions? How important is scalability or succession in your thinking? A focus on organizational growth and continuity suggests an evalpreneur orientation, whereas engagement-to-engagement work with minimal expansion plans aligns more closely with independent consulting.

4. Sources of professional energy and satisfaction.

Finally, reflect on the kinds of work that energize you most. Do you prefer hands-on evaluation practice, direct client delivery, and methodological work? Or do you find greater satisfaction in building systems, delegating work, managing teams, overseeing operations, and developing new business opportunities? A preference for leadership, delegation, and enterprise-building points toward an evalpreneur orientation, while a focus on direct evaluation work suggests an independent consulting orientation. Many practitioners occupy a blended space across these tendencies.

Taken together, these dimensions are intended to help you form a more grounded sense of where you currently sit on the continuum and where you may wish to move next. The following section turns to narrative examples from evaluators' lived experiences to show how these orientations develop in practice and how they shape different pathways into evalpreneurship.

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7.4: Stories about Pathways Evaluation Consultants Take to Become Evalpreneurs

This section presents a selection of narrative stories drawn from interviews conducted for Uwitonze's (2025) dissertation, illustrating diverse pathways evaluation consultants take to become evalpreneurs. The three cases featured here come from a broader sample of 22 evalpreneurs, only one of whom identified as male; this distribution likely reflects the gender composition of the evaluation consulting field and the dissertation sample rather than a deliberate selection criterion for this chapter.

Each story highlights distinct professional decisions, evolving responsibilities, and the ways in which values, skills, and opportunities interact to shape entrepreneurial careers. Together, they illustrate that evalpreneurship is not a single archetype but a range of practice trajectories, including solo practice, growing consultancy, and more collaborative or shared ownership. As you read, consider how your own skills, interests, and values might align with—or diverge from—these pathways, and what other trajectories into evalpreneurship might look like in your own practice context.

Solo Consultant - Boutique Firm (Lucia)

Lucia's story illustrates the transition from independent consultant to leading a boutique firm. She is a 52-year-old White woman with over 21 years of experience in evaluation. In 2017, she launched her own evaluation consulting firm. She holds a master's degree in public administration. As the owner, Lucia manages a team of more than five full-time staff members and collaborates with subcontractors, partners, and other stakeholders in the evaluation consulting space.

Her journey to becoming an evalpreneur is deeply rooted in her personal experiences. Growing up in a diverse environment, she encountered many perspectives that exposed her to inequities in the world and ignited a passion for social justice, particularly supporting marginalized communities. Reflecting on her path, Lucia shared:

> Originally, I was a math major during college, but was drawn to the understanding of communities, and I ended up earning my degree in anthropology. After graduation, I worked in various nonprofit organizations and then transitioned to a role as a research assistant in the field of evaluation and learning. That's when I realized I had found my niche—I loved conducting research, but more than that, I loved gathering data and feedback that could help people to lead social change efforts, improve their work, and reach more people. I spent time working in academia, nonprofits, and even in a corporate consulting firm. Then, after a while, I decided to take the plunge and start my own business, eight years ago. It's a smaller evaluation and learning firm that focuses on advancing equity in evaluation and philanthropy (Uwitonze, 2025, p 99).

Cooperative or Ownership without Solo Entrepreneurship (Ella)

Ella's path demonstrates a model of entrepreneurship that is collaborative, with shared leadership and democratic decision-making. She started as an intern 14 years ago in an evaluation consulting firm, but a year and a half ago, she transitioned from an employee to a worker-owner in the same firm. As Ella explained,

> I am an evalpreneur working in a worker-owned cooperative evaluation firm. After employees go through a few steps, they can become worker-owners and take part in decision-making. Currently, 17 of 19 eligible employees are worker-owners. We all help make important decisions like the budget and electing the board of directors. In addition to consulting, I'm also part of the management team. While I still provide evaluation services, I also help with daily decisions that affect the organization, supporting decisions brought to our worker-owners and staff (Uwitonze, 2025, p 102).

Her firm, specializing in evaluation, planning, and facilitation, was founded by a sole owner in 2010 and became a worker-owned cooperative in August 2023. Similar to producer co-ops in agriculture, the model operates on principles of collective ownership and democratic decision-making; each member has one vote, ensuring that all voices shape the company's success.

Business Partner and Accidental Evalpreneur (Clara)

Clara's story illustrates how entrepreneurial roles can emerge unexpectedly, combining evaluation practice with unplanned leadership responsibilities. Clara is a business partner and Chief Operating Officer (COO) of an evaluation consulting firm, a role she has held since 2023. Although the firm was formally established in 2018, Clara has worked closely with the founder since 2020. Their relationship began in graduate school as peer mentors and eventually evolved into friendship and, finally, a business partnership. Unlike many evalpreneurs who intentionally set out to start a firm, Clara describes her path as unplanned. She reflected:

> My journey to becoming an evalpreneur was very accidental. My business partner and founder wanted to grow her own business, but that was never my intention. I always say that I am an intentional evaluator because I knew from early on that I wanted to work as an evaluator, but I'm an accidental entrepreneur. However, I will say entrepreneurship runs in my family. Both of my grandparents, on both my mum's and dad's sides, were entrepreneurs. Now that I have become an evalpreneur, it is incredibly fulfilling. I love growing our team, I love evaluation, I love our clients, and I am proud to have become an evalpreneur (Uwitonze, 2025, p 103).

In retrospect, she sees how those influences may have quietly shaped her openness to stepping into an entrepreneurial role when the opportunity emerged. Now fully embedded in the firm's leadership, Clara finds deep fulfillment in her work.

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7.5: CONSULTING IS EASY—AND HARD - LEARNING THE TRICK BEHIND TEAMWORK

At first glance, consulting seems easy, especially when problems are simple and clearly defined - an evaluation consultant can often work independently. Many consultants begin this way—operating as independent contractors or sole proprietors who provide specialized evaluation expertise to clients without involving a team or collaborators. However, consulting becomes more demanding when the problems being addressed are complex, interdisciplinary, or involve multiple stakeholders. Many evaluation projects require teams of consultants, partnerships across people or organizations, and engagement with clients or communities who bring different perspectives and expertise. As collaboration increases, so does the complexity of the work. The technical task is no longer the only challenge; how people work together becomes equally important. In this case, consultants find that while technical problems are clear and solvable, the interpersonal dynamics of collaboration make the work challenging.



Figure 7.5.1: More complex evaluation projects may require multiple methods of collaboration.

The key to navigating this challenge lies in understanding a simple but powerful distinction between *Problem A and Problem B* (Kirton, 2011). Consultants are typically hired to solve *Problem A*—the technical task or evaluation task at hand. But successful consulting also requires resolving *Problem B*: how best to manage the human dynamics that arise when people work together to solve Problem A. The "trick" to effective consulting is learning how to recognize and manage Problem B so that it does not interfere with solving Problem A. The following vignette illustrates how easily Problem B can derail a project—even when the team has the expertise needed to address Problem A.

7.5.1: Early Evaluation Consulting Experience by Uwitonze

7.5.2: Towards Understanding the Actual Problem - Recognizing Problem A and Problem B

7.5.3: Where Do Problem Bs Come From?

7.5.4: What is A-I theory and its inventory the KAI?

7.5.5: Why KAI is useful in consulting

7.5.6: Coping Behavior - Why It Takes Energy and How Your Style Shapes It

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7.5.1: Early Evaluation Consulting Experience by Uwitonze

In 2019, I launched a management consulting firm in Rwanda focused on research, evaluation, and advisory services. At the time, consulting began as a side endeavor while I was working full-time with a nonprofit implementing a USAID-funded project (United States Agency for International Development) aimed at improving agricultural productivity, household income, nutrition, access to finance, and climate change adaptation. In my role as an extension and climate-smart agriculture advisor, I frequently collaborated with external consultants and closely observed how consulting teams worked. Over time, I noticed a gap. While many consultants were technically skilled, I often found myself thinking that I could contribute more effectively. To gain experience, I began taking on part-time consulting assignments, often joining teams as a subcontractor or collaborator.

One assignment involved a baseline study conducted by a team of five experts. On paper, everything appeared well organized: the team had the necessary expertise, the assignment was clearly defined, and we even traveled away from our regular work environments to focus on the work. Yet almost immediately, problems emerged. Roles were unclear, decisions became contested, and collaboration broke down. Despite our collective expertise, the team struggled to function effectively and ultimately failed to get the job done on time. Looking back, the issue was not technical competence but something else.

What was the problem?

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7.5.2: Towards Understanding the Actual Problem - Recognizing Problem A and Problem B

In evalpreneurship, it's easy to assume that the hardest part of a project is the technical work itself. After all, clients hire evaluators for their expertise—to design studies, collect and analyze data, or produce reports. This is what we call Problem A: the primary task that needs to be completed. Problem A requires technical knowledge, methodological skill, and subject-matter experience. In the vignette, Problem A was straightforward: the team needed to conduct a baseline study and deliver a report. The team had the qualifications to do the work, yet the project still faced challenges. Why? Because solving Problem A alone is rarely enough.

The real difficulty often lies in Problem B: the challenge of interpersonal and team dynamics that emerge while working to solve Problem A. Problem B includes issues such as unclear roles, competing priorities, communication breakdowns, differing work styles, and conflicting expectations. It is often subtle and easy to overlook. One team member may feel unheard in meetings, another may prefer structured planning while others value flexibility, and feedback may be interpreted differently depending on perspective. If Problem B is not recognized and managed, it can slow progress, create frustration, or even derail an entire project.

For more about Problem A and Problem B, see: kai - Ensuring leaders get desired results from teams

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7.5.3: Where Do Problem Bs Come From?

Problem B often emerges when consulting teams bring together individuals with diverse backgrounds, experiences, and perspectives. These differences can include identity factors such as:

- race,
- gender,
- language,
- culture,
- values,
- professional training,
- geography,
- socioeconomic background,
- status,
- and prior work experiences (Uwitonze, 2025),

all of which shape the knowledge, skills, and lived experiences each person contributes to problem-solving.

While each of these differences may contribute to Problem B, one common and often overlooked contributor to Problem B is a difference in problem-solving styles among team members. According to KAI, one's problem-solving style is an innate and stable dimension of one's personality, which shapes how team members are perceived by colleagues, clients, and professional networks, as well as how they approach Problem A and Problem B.

To learn more about Problem A vs Problem B in an evaluation context, refer to the AEA's e-study workshop on Practical Applications of KAI in Evaluation Practice. This workshop will help you:

1. Describe aspects of KAI theory and cognitive diversity as applied to evaluation practice.
2. Explain how adaptive and innovative evaluation consultants prefer to solve problems.
3. Identify the concepts of Problem A and Problem B in the context of evaluation.

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7.5.4: What is A-I theory and its inventory the KAI?

People approach problems in very different ways. Some prefer structured environments, clear procedures, and step-by-step planning, while others thrive on exploring new ideas, questioning assumptions, and working in ambiguity. Some focus on refining and improving existing systems, whereas others seek to redesign or transform them entirely. These differences reflect *problem-solving styles*, not differences in intelligence, competence, experience, or motivation (Friedel, 2014). Recognizing these differences is key to understanding and managing the cognitive diversity—that often complicate consulting work. British psychologist Dr. Michael Kirton developed *Adaption-Innovation (A-I)* theory to describe these differences in problem-solving style. According to Kirton (2011), problem-solving style is the "strategic, stable, characteristic, preferred way in which people respond to and seek to bring about change" (p. 66). These styles are measured using the *Kirton Adaption–Innovation Inventory (KAI)*, which places individuals along a continuum from adaptive to innovative (Friedel, 2014).

KAI is an inventory consisting of 32 assessment items developed by Kirton (1976). Since its introduction, KAI has shown high estimates of reliability and strong evidence of validity, making it a widely accepted instrument and is considered one of the leading measures of problem-solving preferences and differences in creativity and teamwork (Jablokow et al., 2009). The KAI identifies an individual's position on a continuum ranging from "more adaptive" to "more innovative" (Friedel, 2014). The total KAI continuum ranges from 32 to 160, with a mean score of 95, representing a normal distribution curve for the general population (Figure below).

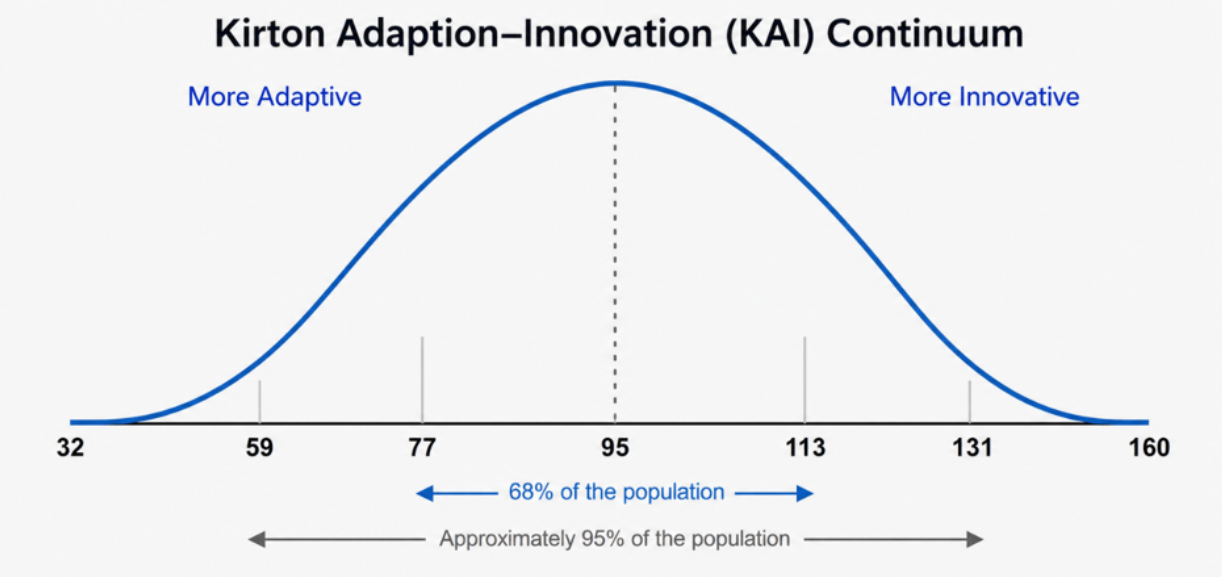


Figure 7.5.4.1: Adaption-Innovation continuum. Source: Authors

Along this continuum, people who are more adaptive with respect to the general population score between 32 and 95, with the degree of strength of the adaptive preference being stronger closer to 32 points. Individuals who score between 96 and 160 are more innovative, with a stronger innovative preference being closer to 160 points. As problem-solvers and change agents, adaptive individuals prefer structure, stability, and incremental improvement. They often thrive in environments that emphasize predictability, careful planning, and the refinement of existing systems and processes. Their strengths commonly include consistency, attention to detail, and the ability to implement practical solutions efficiently. In contrast, innovative individuals are generally more comfortable with ambiguity, experimentation, and transformational change. They prefer to challenge conventional approaches, generate unconventional ideas, and pursue new ways of addressing complex problems (Friedel, 2014).

Sex differences have been observed in KAI scores, with females having a mean score of 91 and males having a mean score of 98, which has been consistent across different age groups, regions, and cultures (Kirton, 2011). There is no evidence of any other differences of problem-solving style among different demographic variables, including age, generation, culture, ethnicity, intelligence, or economic status (Friedel, 2014). It is important to note that while one may be more adaptive or more innovative with respect to the general population, one is also more adaptive or more innovative based on the membership of one's team.

Example 7.5.4.1

If an innovative individual whose problem-solving style (as measured by the KAI) is a 110, on a team with individuals who scored 125 and 138, the individual who is a 110 is the most adaptive member on the team. Likewise, an adaptive person with respect to the general population, scoring 82, and on a team of individuals who scored 68 and 53, the individual scoring 82 is the most innovative member on the team.

To learn more, refer to:

- The official website for KAI- one of the world's foremost measures for problem-solving, teamwork, and creativity: kai.foundation, where you will find an overview of KAI,
- Podcasts introducing how to build better teams and great leaders using KAI,
- blogs & articles, case studies with real applications of KAI in various contexts,
- KAI courses and events, and more.

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7.5.5: Why KAI is useful in consulting

Understanding problem-solving style is especially important for consultants—and particularly for evalpreneurs, who frequently lead teams, collaborate across disciplines, and act as agents of change within the evaluation marketplace (Sabarre, 2021).

Recognizing we each have different problem-solving preferences informs not only how evalpreneurs manage internal organizational change, but also how they respond to market disruptions, design services, engage clients, and build professional relationships. Consequently, self-awareness and the intentional management of Problem B become essential for effective consulting practice. Without an understanding of these cognitive differences, tensions may emerge around communication, decision-making, trust, or expectations for change. However, when recognized and managed constructively, these differences can become a valuable source of creativity, balance, and organizational strength.

The significance of the KAI framework lies in its ability to provide leaders with a practical tool for intentionally building and managing cognitively diverse teams. Rather than treating differences in thinking as barriers, KAI helps consultants recognize how adaptive and innovative approaches can complement one another. Sabarre (2021) emphasized that diversity in thinking not only strengthens day-to-day operations but also contributes to long-term sustainability and organizational resilience. One evalpreneur captured this perspective by explaining, “It can’t ever be about me because it’s not sustainable that way… I want a diverse team with different strengths and ideas—people who challenge me. That helps my business thrive” (p. 68). This reflection highlights the importance of creating teams in which differing perspectives are viewed as assets rather than obstacles.

Additional evidence of the value of cognitive diversity appears in Uwitonze’s (2025) study of evalpreneurs, which reported that partnership and collaborations that combine and leverage adaptive and innovative differences can strengthen team collaboration and effectiveness.

For instance, Clara (KAI = 78), a more adaptive evalpreneur (Co-owner), partnered successfully with a highly innovative business partner, said:

> My business partner creates the frameworks, and I focus on making them as effective as possible. This dynamic works well within our team too. We have a mix of people with different problem-solving styles, but those of us who are more adaptive tend to be excellent project managers. We excel at execution, getting things done, and making ideas a reality. If it weren't for my business partner’s innovative approach, I’m not sure I would have joined forces with her. I could have just as easily worked at a foundation doing internal evaluation, but I felt that my adaptive strengths added value to this partnership, complementing her innovative mindset. I am creative, but I prefer focusing on processes and systems rather than abstract concepts or visions.”

Clara’s adaptive approach enhances partnership by providing structure and practical execution to balance her partner’s innovative vision, demonstrating the power of combining different problem-solving styles for business success.

Another example of a complementary business partnership was found between innovative evalpreneur Brooke (KAI = 127) and her adaptive business partner Clarisa (KAI = 80). Reflecting on her KAI results, Clarisa noted:

> When I saw the results of my KAI assessment, it resonated with me. I tend to prefer structure and clarity. I like knowing the rules, and although I'm open to change, I want us to follow a process if we're going to make adjustments." She further explained how her adaptive tendencies show up in her work: "I'm someone who thrives on structure. I’m comfortable making changes, but they need to be done in an organized, systematic way. Brooke, on the other hand, is more of a go-getter. She prefers to break free from structure and act on impulse. That can be challenging for me at times, as I often find myself needing to slow her down, remind her about the process we developed, and ensure we stick to it.

As she reflected further on how her style contrasts with her business partner’s style, Clarisa recognized how her practical strengths complement Brooke’s innovative style. She explained:

> Brooke often wants me to be more spontaneous, whether it’s writing blog posts or taking on tasks that require more creative or outside-the-box thinking. But for me, it takes more effort to engage in those activities. I’m better at adapting ideas that are already in place, like proposals. It’s just not my strength to come up with brand-new, innovative concepts from scratch.

In these partnerships, adaptive partners naturally took on structured responsibilities, including financial oversight, project management, and team coordination, while innovative partners focused on strategic planning, marketing, and exploring new opportunities. This intentional division of labor enhanced performance and enabled each partner to operate in ways that leveraged their natural problem-solving strengths.

To learn more about how to work well with a different problem-solving style than your own, consider:

· kai.foundation - Guide for more adaptive dealing with the more innovative

· kai.foundation - Guide for more innovative dealing with the more adaptive

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7.5.6: Coping Behavior - Why It Takes Energy and How Your Style Shapes It

In consulting, coping is the deliberate act of stepping outside your preferred problem-solving style to meet the demands of clients, teams, and projects. It is a critical skill that we each learn for managing Problem B—interpersonal, structural, or situational challenges that disrupt your preferred way of working (Kirton, 2011; Uwitonze, 2025), as well as Problem A, the task to complete. Every consultant has a preferred approach to problem-solving, and when tasks or situations require you to push beyond your preferred style, coping to operate more adaptively or more innovatively becomes essential to maintain performance, meet client expectations, and keep teams functioning smoothly. Coping is mentally demanding, based on effort, time, and intensity. The further a task takes across the KAI continuum away from your preferred style, the more energy it requires, just like navigating a steep, bumpy hill (Figure 2). Recognizing these moments early allows you to plan, seek support, and reduce fatigue, transforming what often feels like hidden labor into a deliberate strategy for sustaining professional performance.

As a learned skill we utilize to operate outside of our preferred problem-solving style, we can turn it on and off as we see the need to do so. Once coping is turned off, one reverts to one's preferred problem-solving style. In the case of evalpreneurship, an adaptive individual may need to improvise a participatory evaluation approach when a client requests solutions outside the norm, while an innovative individual may need to follow strict reporting guidelines or compliance protocols. In both cases, the use of coping behavior to meet people where they are positioned on the KAI continuum can help minimize friction, confusion, and delays that Problem B can create (Friedel & Uwitonze, 2025). Coping also supports collaboration. When you understand the different problem-solving styles on your team, you can assign tasks according to natural strengths and reserve coping for situations involving a crisis. This reduces unnecessary stress, prevents overload, and strengthens trust among colleagues (Kirton, 2011; Jablokow et al., 2010).

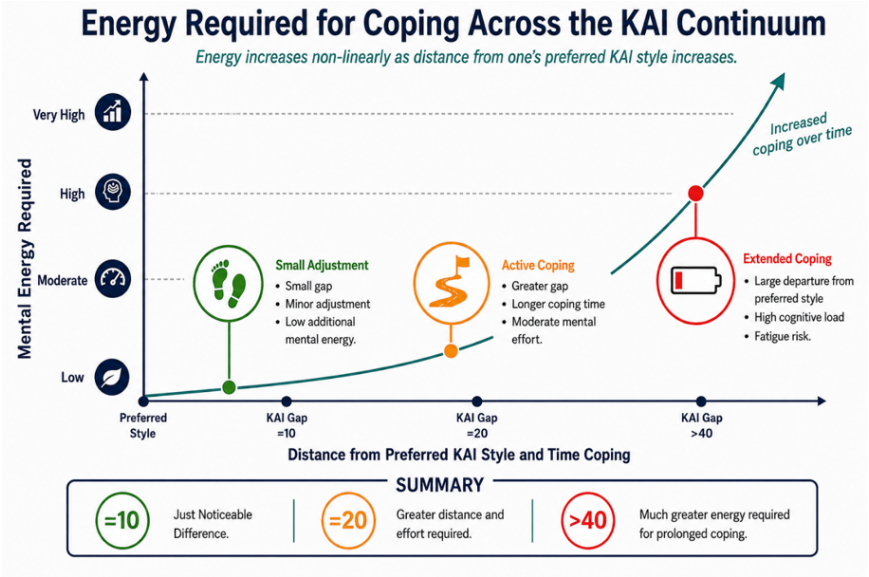


Figure 7.5.6.1: Energy Required for Coping Across the KAI Continuum. Source: Authors

It is important to recognize that coping draws on mental resources. The greater the mismatch between your style and the task, or the person, the more energy is spent. Without awareness or strategies to manage this energy, prolonged coping can lead to stress, fatigue, or burnout (Uwitonze, 2025; Friedel & Uwitonze, 2025). Planning ahead to anticipate when tasks will require coping, seeking guidance, and taking breaks can reduce this burden and protect your well-being. Deliberate coping also fosters growth. Reflecting on experiences where you stretched beyond your comfort zone helps you understand what works, what is draining, and how to handle similar situations more effectively in the future. Over time, these experiences build resilience, emotional agility, and professional confidence (Uwitonze, 2025).

To learn more about how to enhance leadership through coping behavior, see: trainingzone.co.uk/lead/strategy/enhancing-leadership-by-promoting-coping-behaviour

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7.6: Key Lessons & Reflections for Aspiring Consultants

Before diving into practical strategies, it is important to recognize that successful evalpreneurship extends far beyond technical expertise. Consulting is not only about solving technical problems—it is also about working effectively with people. Success depends on understanding yourself, recognizing others' working styles, and developing approaches for navigating tasks or situations outside your comfort zone. The Kirton Adaption–Innovation (KAI) framework offers a useful way to reflect on problem-solving preferences. Adaptive consultants tend to thrive on structure and predictability, whereas innovative consultants are often energized by challenging assumptions and flexibility. Most professionals fall somewhere in the middle of this continuum, and awareness of one's tendencies helps anticipate challenges, strengthen communication, and sustain energy for high-performance collaboration (Uwitonze, 2025).

The following lessons are organized into three interconnected areas central to effective consulting practice. The first focuses on self-awareness and professional growth, emphasizing how understanding cognitive preferences can strengthen adaptability and continuous learning. The second highlights collaboration and client engagement, illustrating how appreciation of different working styles improves teamwork and reduces conflict. The final area addresses resilience and sustainability, underscoring the importance of managing stress, protecting energy, and maintaining wellbeing in demanding consulting environments. Together, these lessons demonstrate that consulting effectiveness depends not only on expertise, but also on interpersonal awareness and long-term professional sustainability.

1. Know Your Style and Its Influence.

One's preferred problem-solving style indicates how consultants approach assignments, interact with clients, and contribute within teams. Self-awareness forms the foundation of professional development. Understanding whether you prefer adaption or innovation allows you to anticipate which responsibilities will feel energizing and which may require greater effort. For instance, adaptive consultants may need to recognize when too much attention to process and detail is slowing down the team, whereas innovative consultants may need to hold back on the random idea as it may be inappropriate for the time. Recognizing these situations in advance may help in managing work in the day according to when one has more energy and reduces procrastination (Uwitonze, Archibald, & Friedel, 2025).

2. View Coping as a Professional Asset.

Coping is not a weakness; it is an intentional professional capability needed to effectively lead to being an evalpreneur. Moving beyond preferred ways of working enables consultants to respond effectively to client expectations, maintain group cohesion, and navigate solving new problems. Framing coping as an opportunity for development rather than a burden encourages a more constructive mindset and builds confidence when facing unfamiliar demands (Uwitonze, 2025).

3. Reflect, Learn, and Evolve.

Experiences that require coping also create opportunities for growth. After navigating a difficult situation, consultants can reflect on several questions: What worked well? What was especially draining? What could be handled differently next time? Reflection deepens self-awareness, improves judgment, and strengthens professional confidence over time (Uwitonze, 2025).

4. Recognize and Reduce Problem B.

Problem B—interpersonal tensions, structural barriers, or situational complications—can disrupt evalpreneurship efforts when left unaddressed. Coping strategies help minimize these disruptions when coupled with mutual respect and humility. When consultants intentionally operate outside their preferred style, they can strengthen team relationships, preserve client trust, and keep projects progressing smoothly. Anticipating situations that demand extra adjustments such as facilitating participatory workshops or completing detailed compliance reporting—reduces friction and supports stronger working relationships (Friedel & Uwitonze, 2025).

5. Harness Cognitive Diversity.

The nature of the problem should indicate the type of diversity needed to best solve the problem. Teams are most effective when members contribute complementary strengths. Adaptive and innovative team members bring different yet equally valuable perspectives, balancing fresh ideas with practicality and balancing the appropriate amount of structure to implement the solution. Awareness of colleagues' preferences for adaption or innovation and recognizing these preferences are unrelated to intelligence and motivation, reduce misunderstandings, improves coordination, and supports more effective distribution of responsibilities according to individual strengths. As a result, teams can avoid excessive strain while improving productivity and overall outcomes (Friedel & Uwitonze, 2025; Jablokow et al., 2010).

6. Recognize Invisible Effort.

Coping demands mental and emotional energy, much of which may remain unnoticed by clients or colleagues. Acknowledging this hidden effort is essential for sustaining motivation and wellbeing. Support systems such as mentorship, peer networks, and structured reflection can help consultants manage pressure and maintain long-term effectiveness (Friedel & Uwitonze, 2025).

7. Cultivate Coping as an Essential Skill.

Use of coping behavior is not an occasional requirement in consulting; it is a continuous part of professional practice. Developing coping skills and using techniques to simulate coping behaviors may improve collaboration and support higher-quality work. Over time, experiences that initially feel exhausting can become opportunities for development, contributing to leadership capacity and sustained professional success (Kirton, 2011; Uwitonze, Archibald, & Friedel, 2025).

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7.7: Conclusion

In conclusion, these lessons show that effective evalpreneurs depend not only on technical knowledge but also on self-awareness, adaptability, collaboration, and resilience. To apply these ideas in practice, consider the following reflection questions:

1. *Where do you fall on the adaptive–innovative continuum, and how does this shape your work?*
2. *Which recurring Problem Bs challenge you, and how could you better respond?*
3. *How could greater awareness of colleagues' preferred problem-solving styles improve teamwork and reduce conflict?*
4. *What intentional strategies could help you manage stress while maintaining strong performance?*
5. *How might these experiences strengthen your professional growth, leadership potential, and ability to guide teams and clients successfully in complex evaluation consulting environments? Engaging with these prompts helps you apply the KAI framework thoughtfully, turning self-awareness into actionable strategies that enhance your consulting practice.*

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8: CULTURALLY RESPONSIVE EVALUATION AND CONSULTING WITH COMMUNITY-BASED ORGANIZATIONS

8.1: Introduction

8.2: Case Study 1

8.2.1: Three Main Pillars of Cultural Humility

8.2.2: Preparing for Consulting and Evaluation - Developing Awareness

8.2.3: Developing Practical Skills

8.3: Case Study 2

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8.5: Conclusion

8.6: Resources/Tools and Instruments

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8.1: Introduction

Community-based organizations (CBOs) in the United States provide a wide range of services to vulnerable individuals and populations with diverse needs and circumstances. These organizations play a critical role in supporting consumers, promoting life skills, advancing health and wellness, and fostering full participation in community and civic life (Suarez-Balcazar et al., 2015). As CBOs adapt to the needs of an increasingly diverse and multicultural society, they are challenged to develop more inclusive and responsive service-delivery approaches. Likewise, evaluation consultants must be prepared to work effectively across cultural differences by understanding and engaging with populations that bring diverse identities, lived experiences, languages, values, and ways of knowing. Culturally responsive evaluation offers a framework for ensuring that evaluation practices are respectful, relevant, and meaningful to the communities being served, while producing findings that accurately reflect their experiences and perspectives.



Figure 8.1.1: CBOs in the U.S. provide a wide range of services.

Consultants play a crucial role in promoting culturally responsive evaluation and should be well-positioned to provide culturally relevant consulting services. Supporting CBOs' efforts to meet the needs of a growing, diverse population requires knowledge and skills in cultural awareness, cultural humility, and the creation of a culture of organizational learning (Lopez et al., 2017; Purnell & Paulanka, 2008). Crusto et al. (2020) suggest that culture and context inform the consulting process, evaluation plan, the most appropriate design and methods of data collection, as well as inform evaluation questions, sensitive and relevant strategies for data collection, ways to engage program participants, and outcomes that matter to the respondents of interest. To that effect, several scholars and practitioners have called for culturally responsive evaluation and consulting (Adedoyin & Jones, 2024; Chouinard & Cram, 2019; Hood et al., 2015).

The purpose of this chapter is to provide readers with foundational knowledge, skills, and practical strategies for culturally responsive evaluation and consulting. We will begin with a discussion on culturally responsive evaluation and consulting, followed by specific strategies. Cases and discussion questions are integrated throughout the chapter.

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8.2: CASE STUDY 1

Ann has served as a consultant to a local agency providing support services to underserved youth and their families, including after-school programming, youth leadership, and family case management and therapy. A few years back, Ann assisted the agency in evaluating a youth leadership program for predominantly White youth. The agency called Ann back and would like her to be involved in assessing the peer-tutoring program for high school students. The agency was very pleased with Ann's work and the quality of the evaluation, and she has maintained a strong relationship with the agency.

During the first few visits, Ann realized that the populations served by the agency had undergone drastic changes and that the CBO wanted to include brief interviews with the new participants. Ann identifies as a third-generation Italian American who grew up in a mid-sized city in the Midwest. Ann has no prior experience working with this ethnically and racially diverse population, and she is unsure where to begin preparing for this project. Most participants are first-generation Somalis. The CBO has assured Ann that they want her to consult on the evaluation, given her successful history with the agency. The agency is in a neighborhood that has undergone significant demographic changes over the last 10 years, including an influx of new immigrants from Africa.

- Ann is worried about her lack of experience and limited knowledge of Somali youth and families. She is not sure she will be able to communicate with participants effectively and acknowledges her lack of familiarity with the culture.
- Ann needs to start by getting acquainted with the target population's culture, traditions, ways of thinking, and doing.
- Ann needs to engage in a reflective learning process to build foundational knowledge in culturally responsive evaluation and consulting, as explained below.

What does it mean to be culturally responsive in evaluation and consulting with CBOs?

To be culturally responsive, consultants must be prepared to engage with a wide range of stakeholders representing diverse identities, perspectives, and experiences. This includes working effectively with individuals whose ways of thinking, communicating, behaving, and understanding the world may differ from their own. Culturally responsive consultants also implement evaluation and consulting processes, protocols, and methods that are relevant, respectful, and responsive to the cultural contexts and needs of the populations being served. The consultant must be prepared to engage meaningfully with a diverse range of stakeholders and be accountable for their actions. The consultant needs to engage with stakeholders with an open mind, suspending judgment, listening, and practicing cultural humility.

Foundational knowledge on Culturally Responsive Evaluation and Consulting

Over 25 years ago, several fields adopted the term "cultural competence" to describe an individual's skills, knowledge, and ability to understand and effectively serve individuals from diverse backgrounds (Balcazar et al., 2009; Campinha-Bacote, 1999; Dunn et al., 2006; Suarez-Balcazar et al., 2011). However, more recently, the emphasis has been on developing culturally responsive practices, practicing cultural humility, integrating diversity, equity, and inclusion (DEI) into every evaluation phase, and centering the voices from historically marginalized populations (Adedoyin & Jones, 2024; Chouinard & Cram, 2019).

Culturally responsive practices

Engaging in culturally responsive evaluation and consulting involves one's ability to understand and interact with people from diverse backgrounds adequately, develop trusting relationships with diverse individuals, suspend judgment, engage in self-reflection, and develop consulting and evaluation processes, practices, and methods that align with the culture and ways of doing and thinking of the population of interest (Adedoyin & Jones, 2024). This involves an interactive, developmental, and contextual process, as well as engaging in reflective practice.

Practicing cultural humility

Cultural humility refers to one's ability to set aside judgment, ask questions safely and humbly, listen carefully by being fully

present, and allow the other person to talk at their own pace. Listening carefully and learning about the other person are essential dimensions of cultural humility (Bauer et al., 2022; Campinha-Bacote, 2019). Cultural humility also implies being vulnerable, acknowledging that we do not have all the answers, and involves knowing how to express kindness and compassion, balancing power differentials, being transparent, not imposing, nor arrogant, allowing the other to be themselves, and starting where the client is (Campinha-Bacote, 2019; Fletcher, 2024).

8.2.1: Three Main Pillars of Cultural Humility

8.2.2: Preparing for Consulting and Evaluation - Developing Awareness

8.2.3: Developing Practical Skills

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8.2.1: Three Main Pillars of Cultural Humility

Exercise 8.2.1.1

Watch this 7.12-minute video on cultural humility and learn about the three main pillars:

https://www.youtube.com/watch?v=_Mbu8bvKb_U

- Lifelong Learning and Critical Self-Reflection
- Recognizing and Challenging Power Imbalances
- Institutional Accountability

After watching the video, write down at least two strategies to achieve each of the three pillars. Then consider which strategies you think will be feasible in your own work and how they may help you in addressing barriers.

Practicing **cultural humility** involves being intentional in providing opportunities for clients to be themselves and practice their cultural values and traditions. Hook et al. (2017) and Bauer et al. (2022) proposed a multicultural framework applicable to evaluation and consulting. The framework includes three key components: Practicing cultural humility is part of a larger multicultural framework, which consists of (1) cultural humility, (2) cultural opportunities, and (3) cultural comfort.

Cultural opportunities are instances in which the consultant explores the diverse cultures of stakeholders at the CBO and engages in culture-related conversations. Avoiding or ignoring culture-related conversations may be perceived as insensitive or a microaggression (Hook et al., 2016).

Cultural comfort refers to managing cultural conversations with diverse stakeholders at the CBO and providing opportunities for them to share their cultural information. The consultant may use what is learned to inform the evaluation methods and consulting strategies.

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8.2.2: Preparing for Consulting and Evaluation - Developing Awareness

Preparing for consulting and evaluation also requires developing awareness and recognizing the importance of communication. Developing awareness of who we are is another critical step in practicing cultural humility. We propose a framework to foster awareness among evaluators and consultants. This model illustrates the dimensions that help us prepare for consulting. This framework involves three dimensions. First, **self-awareness;** then **multicultural awareness;** and **finally, critical awareness.** These three dimensions are interactive and dynamic. See Figure below.

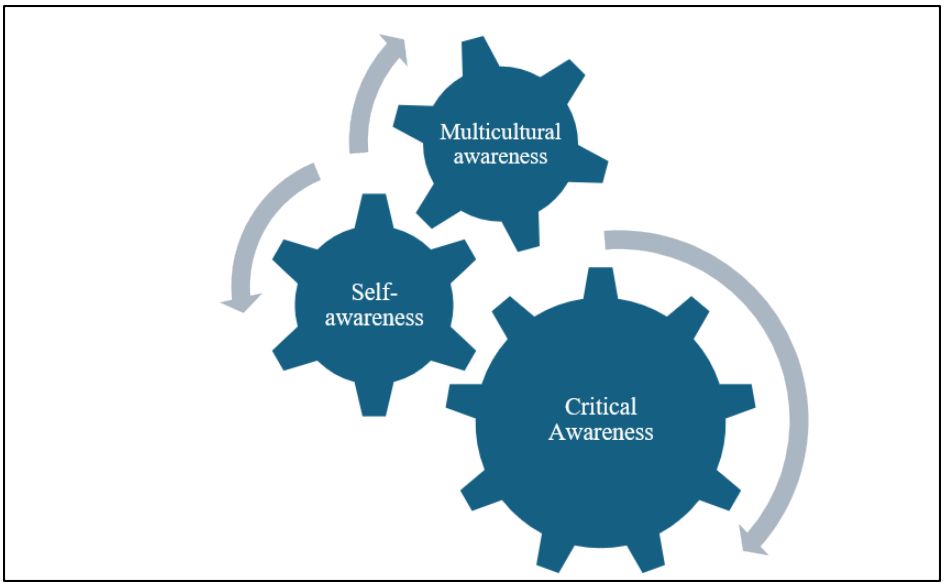


Figure 8.2.2.1: Interactive levels of awareness framework

Definitions

Self-awareness begins with reflecting on our own ideas about others who are different from us, our biases and values, and our ways of thinking and doing. We essentially ask ourselves, 'Who am I?' What are my own biases? Values? Moreover, what are my ideas about others who are different from me? How prepared am I to work and consult in an unfamiliar context? *Engaging in self-awareness, Ann realizes that she is biased towards this group; without knowing, she assumed that most Somali refugees and immigrants are uneducated.*

Multicultural awareness is the process of becoming knowledgeable about and aware of the similarities and differences between oneself and the people with whom one is working. It entails recognizing both our similarities and differences. This also involves understanding the similarities and differences among the diverse stakeholders essential to the organization's content. *Engaging with participants and learning about them from agency staff and reading material, Ann learned that the agency participants value **collectivism**, **resilience**, and **generosity.***

Critical awareness refers to the formation of social consciousness as both a historical phenomenon and a complex human social process (Freire, 1973; Turner-Zwinkels et al., 2016). Therefore, we become knowledgeable about the social, environmental, and systemic realities of the diverse stakeholders served by and within the organization (e.g., clients, clients' families, agency staff) and the neighborhood where the organization is located. Critical awareness fosters the realization of the realities and lived experiences of the population served. This is information that will support the evaluation and consulting process and methods. *Engaging in critical awareness, Ann realizes that many of the Somali families served by the agency are experiencing discrimination in the broader community and a lack of English proficiency.*

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8.2.3: Developing Practical Skills

Repetitive engagements, including visits to the organization, observation, and connection with diverse stakeholders, such as agency clients, promote one's critical awareness, knowledge, and cultural comfort (Balcazar et al., 2010). This should be followed by having opportunities for reflection and analysis of professional performance. Consultants may be challenged by the growing number of encounters with people from diverse backgrounds and from all parts of the world, who may require language and cultural adaptations to not only receive services but also participate in the evaluation process (Chouinard &Cram, 2019; Hood et al., 2015; Lopez et al., 2017).

At the core of these components and cultural humility in general is knowing how to communicate with diverse stakeholders. **Communication** is key to our interactions with others in consulting and evaluation.

Communication

When developing culturally relevant evaluation and consulting processes and methods, attending to communication is essential. Attending to the communication style may involve considering who the communicator is, what the content/message to be delivered is, the channel and form of communication, and attending to what is communicated beyond words (Backlund & Morreale, 2015). This includes tone of voice, body language, eye contact, management of silence, personal space, and pacing. Keep in mind that what is considered respectful, clear, or appropriate can vary significantly across cultures. Through engagement, the practice of cultural humility (as explained above), and observations, the consultant will be able to identify the essential aspects of the consulting process and the methods employed.

To develop cultural relevance, the consultant must also consider the characteristics of the target population. When engaging with the agency's diverse stakeholders, consider:

- Avoid assumptions about communication preferences. For example, some cultures value directness, while others may prioritize harmony and avoid confrontation. Some may prefer email or text, while others may prefer direct contact.
- Pauses or silence may signal thoughtfulness in one context and disinterest in another.
- Context -- Recognize power dynamics yet consider that in some settings, such as mental health settings, there are hierarchies between providers and clients.
- Practicing cultural humility means actively working to level power dynamics—listening more, speaking less, and validating lived experiences.
- Avoid jargon
- Avoid acronyms
- Use simple, plain language, which means at a 5th-grade level. Practice Health Literacy Strategies (Seidel et al., 2023).

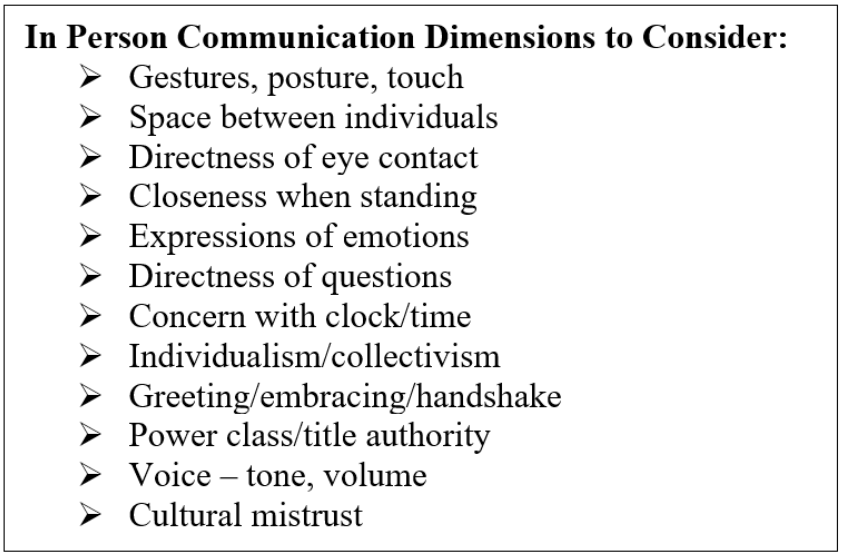


Figure 8.2.3.1: In Person Communication Dimensions to Consider

Be mindful that not all communication with agency staff and program participants will occur in person. Increasingly, communication takes place through technology platforms such as Zoom, email, WhatsApp, Google Meet, text messaging, and other digital tools. As a result, evaluators and consultants must be intentional about how they convey messages across these platforms.

Pay close attention to the clarity of the message, its purpose, the use of culturally relevant and respectful language, and the tone being communicated. Because digital communication often lacks the contextual cues available in face-to-face interactions, misunderstandings can occur more easily. Consider how language, terminology, humor, abbreviations, emojis, and response expectations may be interpreted across cultural groups, generations, and professional roles.

Consultants should also address accessibility and inclusion, including participants' preferred communication platforms, language preferences, literacy levels, access to technology, internet connectivity, and accommodations for individuals with disabilities. Be mindful of power dynamics that may be amplified in virtual spaces and strive to create opportunities for all voices to be heard. Respect cultural norms regarding communication styles, response times, privacy, camera use, and the sharing of personal information. Finally, ensure that digital communications protect confidentiality, demonstrate transparency, and foster trust, as these elements are foundational to culturally responsive and equitable evaluation practice.

Culturally relevant use of interpreters

When consulting with CBOs serving diverse populations, if the consultant wants access to participants, the appropriate use of interpreters should be considered. Although technology is currently used for interpretation (e.g., phone, internet, AI), be mindful of populations that may resist or respond poorly to non-life interpreters. Regardless of which form of interpretation you use, ensure that plain language is used, acronyms are spelled out, and jargon is avoided. Keep in mind that many English concepts lack a direct linguistic or conceptual equivalent in other languages, and vice versa. Below are some guidelines (Enslein et al., 2002).

- Rely on cultural brokers, “promotoras,” and community gatekeepers, if relevant and available.
- Do not rely on children or youth as interpreters.
- Avoid, if you can, adult family members as interpreters. They may be hesitant to translate everything or feel prompted to add information that was not said.
- Acknowledge the interpreter as a professional in communication
- In-person interpreter, engage in direct eye contact with the participant
- Follow health literacy guidelines (e.g., avoid using acronyms, use plain language, short sentences, use visuals)
- When using phone or internet-based interpreters, ensure that it is loud enough and/or in a large font (computer)
- Check for clarity – use the teach-back technique
- Do not assume that because agency participants speak a language other than English, they do not speak English. Inquire and ask.

- Be ready to distinguish low literacy skills from cognitive decline, developmental disability, or mental health disorder.
- Identify the need to have materials in diverse languages
- Use visuals as appropriate

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8.3: Case Study 2

You are consulting with a local agency that provides educational sessions on American culture and navigating urban environments for migrant families. The program is state-funded, and the participating families' primary language is Spanish. You were asked to assist with the program evaluation and invited to visit several families and observe one of the educational sessions.

Although you understand Spanish, you do not consider yourself fluent, so an interpreter was assigned to accompany you during the visit. During interactions with the families, you noticed that the interpreter often translated word-for-word rather than conveying meaning. As a result, families frequently appeared confused and occasionally laughed, suggesting misunderstandings rather than humor. You also observed that some of the interpreter's word choices lacked cultural relevance or appropriateness. For example, during a discussion about using public transportation—specifically the local bus—some families referred to it as *"el camion."* The interpreter appeared confused by this term and did not clarify its meaning, which disrupted communication.

Cultural Nuances

In many Latinx cultures, terminology varies significantly by region. In Mexico and parts of Central America, "the bus" is commonly called *"el camión."* In other regions, such as parts of South America and the Caribbean, people may use *"el bus," "la guagua,"* or *"la troca."* While these terms may literally translate to "truck" or differ from standardized Spanish, they are culturally and contextually used within specific communities. Failing to recognize these regional variations can lead to confusion, miscommunication, and a loss of trust between service providers and families.

Lessons from the Case

This case highlights the importance of using trained interpreters who are not only bilingual but also culturally relevant. If that ideal person is not available at the agency, or in the case of using technological devices to translate –Google Translate or other applications--encourage the participant to use visuals—photos or images—when relevant, and ask further questions to ensure full understanding, such as asking the participant to share examples. Effective interpretation requires an understanding of regional language differences, idiomatic expressions, and cultural context—not just literal translation. Even seemingly simple words can carry different meanings depending on cultural usage. Without this awareness, misinterpretation is likely, potentially undermining program effectiveness and the families' learning experience.

Note

The U.S. Department of Health and Human Services Office of Minority Health developed the National Standards on Culturally and Linguistically Appropriate Services (CLAS). The CLAS standards (see U.S. Department of Health & Human Services, 2025) are primarily directed at healthcare organizations; however, individual providers from other organizations are also encouraged to use the standards to enhance the cultural and linguistic accessibility of their practices. The Office of Minority Health argues that the principles and activities of culturally and linguistically appropriate services should be integrated throughout an organization and undertaken in partnership with the communities being served. Furthermore, consider consulting the American Evaluation Association, which approved its Public Statement on Cultural Competencies in Evaluation (American Evaluation Association, 2011). This statement frames cultural competence as a stance toward culture rather than a fixed set of skills (https://www.eval.org/About/Competencies-Standards/Cutural-Competence-Statement).

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8.4: Strategies for Culturally Relevant and Responsive Evaluation and Consulting

Cultural values, diversity, inclusion, and context influence every consulting and evaluation effort with CBOs and must be considered (Suarez-Balcazar et al., 2024). Suarez-Balcazar et al. (2024) also suggest that community-based organizations interested in implementing programs with different populations need to consider several critical questions: (a) Is the program or service relevant to the population of interest, and to those who are most in need? (b) Is the program or service culturally appropriate to the population of interest? Does it need to be adapted to the target population's values and beliefs? (c) Are assessment instruments, tools, and measures culturally and linguistically appropriate to the target population? Moreover, (d) How would input from potential clients about the program or services be obtained?

All people are shaped by culture, and usually by more than one culture at a time. The phrase "cultural identity" refers to the culture with which someone identifies and to which they look for standards of behavior (Cooper & Denner, 1998). A key aspect of any culture is its dynamism — it continually changes and is influenced by people's beliefs and the demands of their environment (Lopez & Guarnaccia, 2000).

Strategies to guide consulting and evaluation endeavors

Learn about the community served by the CBO and the organization's culture.

As communities become increasingly culturally and linguistically diverse, community-based service organizations (CBOs) are being called upon to do more to reduce disparities in access to and use of essential social services. An important strategy is developing cultural competency—behaviors, attitudes, and policies that enable CBOs to work effectively across cultures. This resource guide identifies readily accessible cultural competency resources that CBOs can use to become more responsive to the needs of their targeted populations and to attract funding to support their important work (Lopez et al., 2017).

For instance, in case #2, the consultant may want to know what families value, which aspects of American culture they would like to learn about, how they spend their leisure time, and where to find the foods they eat in their culture.

Develop trust.

Approach the consulting and evaluation tasks with an open mind, ready to learn, recognizing the influence of culture on your relationship with agency staff and participants, and acknowledging the power dynamics among diverse stakeholders that can impact your work (Betancourt et al., 2009). Create a mutually beneficial relationship and a collaborative partnership (see collaboration model, Suarez et al., 2005). Take the time to build trust, as it will affect your engagement with the CBO.

Contextually, this might include listening to their concerns, volunteering during a family activity, visiting informally with families, and being observant. This process takes time and intentional commitment to learning about the organization and its participants.

Practice cultural humility.

Engage in active listening, respect differences, and acknowledge other ways of doing, thinking, and believing. Cultural humility helps you avoid imposing your own views and set aside biases and judgment. Identify the need for interpreters (oral communication) when interacting with diverse communities before the encounter. For instance, this might be accomplished by:

- Being aware of our U.S. ethnocentric view of the world. Not everyone thinks and acts like us.
- Accepting other ways of doing, thinking, and being.
- Putting all judgment and assumptions aside.
- Being ready to learn from families.
- Being ready to mitigate power imbalances, letting participants and agency staff make decisions and take the lead.

When organizations adapt programs or interventions for use with a different or diverse population, they should: strive to follow

the most current guidelines regarding high-quality translation and/or cultural and linguistic adaptation strategies; have those staff most familiar with the unique characteristics and needs of the targeted population lead the efforts; and pilot-test any newly adapted materials/programs before implementing them broadly, to ensure that all issues have been adequately addressed for the targeted population (Lopez et al., 2017). Follow health literacy plain-language guidelines (National Governors Association, 2025), including using simple language at a 5th-grade level, avoiding jargon and acronyms, and other key principles. Regardless of the language spoken by participants and community residents, it is essential to assess their literacy levels. Keep all information shared in simple, plain language. Avoid acronyms, as non-U.S. community members may not be familiar with common acronyms used in this country or a particular field of study.

Examine the Cultural relevance of interventions, assessments, and protocols.

Consider the cultural appropriateness of protocols, instruments, and interventions. When choosing measures, consider the following steps: if no standardized measures have been developed and tested with the community of interest, pilot-test them with the population of interest; create a community advisory board to provide feedback; identify relevant community-based measures for the evaluation; and establish feedback loops with community stakeholders.

Use a combination of informal and formal assessments to gain a more nuanced understanding of individuals' abilities. Inquire if you need to conduct assessments in private settings. Conduct assessments sensitively and respectfully to ensure that individuals do not feel ashamed, inferior/or feel like "targets of study." Assessments should be culturally sensitive. For instance, the community advisory board (CAB) could provide input on the cultural relevance of the assessments, language/working practices, and the methods to be used for data gathering.

Develop organizational learning and accountability.

Create space for accountability. Encourage conversations that foster difficult dialogues about privilege, equity, and structural change. Encourage providers and programs you oversee to integrate communication training and to budget for interpreter services. Support culturally responsive outreach strategies that align with the community's communication norms. Rely on the CAB to help guide and inform outreach strategies and engage in difficult conversations, if needed.

Recognize our underpinning values.

Many of our professions and programs were developed and grounded on Western values of independence, individualism, materialism, empowerment, self-sufficiency, etc. Recognize that diverse groups may cherish other values, such as spirituality, collective decision-making, co-dependence, cooperation, and familism. For instance, in both families illustrated here, it has been found that decisions about family issues are often discussed with the elderly in the home, that they adhere to a collective view of family, spirituality, and family unity, and that respect for the elderly is strongly valued.

Engage in reflective consulting and evaluation practice- create learning communities.

Engage CBO staff in ongoing reflection and dialogue to enhance services and programs that are culturally relevant and meaningful to participants. As an evaluator and consultant, you can facilitate reflection sessions, study circles, and other forms of ongoing dialogue to help diverse stakeholders enhance and optimize their efforts. Creating a learning community and/or communities of practice centered around common themes of interest to all is critically important. Learning from others and exchanging ideas and experiences about success and challenges enhances growth as a culturally responsive evaluator.

Follow ethical guidelines.

Ensure that the evaluation and consulting project adheres to the ethical guidelines published by the American Evaluation Association (see resources below). Going back to our first case, if Ann had felt that she was not the right person to consult on the evaluation of the youth leadership program, she should have indicated so. However, Ann engaged in several activities described above to prepare herself for this project and felt ready to consult.

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8.5: Conclusion

Culturally responsive evaluation and consulting are best understood as an ongoing, reflective practice that develops over time. Working effectively across cultural differences depends on expertise, alongside self-awareness, multicultural awareness, and critical awareness of the social and systemic realities that shape the communities served by community-based organizations. Cultural humility anchors every stage of the work:

- suspending judgment,
- listening fully,
- acknowledging the limits of one's own knowledge,
- and remaining attentive to power dynamics.

These commitments build trust, communicate with care, select culturally relevant methods, and engage interpreters appropriately, and they are meant to be revisited with each new context, population, and relationship. When consultants approach their work with openness, accountability, and a willingness to learn from the communities themselves. Culturally responsive evaluation is likely to produce findings that are methodologically sound and, at the same time, meaningful, respectful, and genuinely responsive to the people whose lives and programs they seek to understand.

Culturally responsive evaluators may experience challenges engaging in this important work. Some of these challenges include finding culturally relevant instruments and protocols (and using appropriate methods), balancing power dynamics, critically examining practices that perpetuate racism and bias, and addressing communication and language barriers and cultural nuances, among others. To address challenges, consider discussing each challenge early on with partners to find common ground and develop strategies to address them, integrating feedback from the CBO and other critical stakeholders.

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8.6: Resources/Tools and Instruments

- American Evaluation Association, Public Statement on Cultural Competence in Evaluation: https://www.eval.org/About/Competenc...ence-Statement
- CDC Clear Communication Index (tool to assess and improve plain-language materials): https://www.cdc.gov/ccindex/
- Center for Culturally Responsive Evaluation and Assessment (CREA), University of Illinois: https://crea.education.illinois.edu
- *Culturally Responsive Approaches to Evaluation: Empirical Implications for Theory and Practice*
- Frierson, Hood, Hughes, & Thomas (2010). A Guide to Conducting Culturally Responsive Evaluations (National Science Foundation): https://www.hispanicresearchcenter.org/wp-content/uploads/2019/08/Cultural-Competence-Guide-V21.pdf
- National Research Center on Hispanic Children and Families: https://www.hispanicresearchcenter.org/wp-content/uploads/2019/08/Cultural-Competence-Guide-V21.pd
- Strategies to Improve Organizational Health Literacy: https://psnet.ahrq.gov/primer/strategies-improve-organizational-health-literacy#:~:text=Improve%20Spoken%20Communication:%20Organizations%27%20health%20literacy%20plans,deliver%
- Using Plain Language for Effective Health Communication: https://www.nga.org/news/commentary/using-plain-language-for-effective-health-communication/

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9: Placeholder

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10: CONSULTING RELATIONSHIPS - KEY CONSIDERATIONS IN THE CLIENT-CONSULTANT RELATIONSHIP

10.1: Introduction

10.2: Connecting with Potential Clients

10.2.1: The First Conversation (Exploratory Call)

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10.1: Introduction

Years ago, when I first started my consulting practice, I asked my friend, who was my office manager at the time, what *"my thing"* was. *"You are good at relationships,"* she said. Yes, I replied, but how can I sell that?

Over the years, I've learned that building and maintaining strong client relationships is essential to the success of my consulting business. In community-based work, relationships matter, especially in small rural communities, where they are central to daily life. In general, nonprofits are often under-resourced and overwhelmed, so bringing connection, support, and clear communication helps build trust and lays the foundation for a strong client-consultant relationship.



Figure 10.1.1: Author Ann Price with Client

In this chapter, I discuss the importance of the consulting-client relationship. We start with the initial connection with new clients, what things are important to talk about in the early conversations, important things to include in the contract, how to maintain trust and credibility, understanding the client's culture, ethical considerations, how to maintain effective communication, adding value, and finally, tips for closing out a consulting project.

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10.2: CONNECTING WITH POTENTIAL CLIENTS

How you come to know your clients may happen in several ways. Potential clients may come from networking at conferences or community meetings. You might also come to know potential clients by responding to Requests for Proposals (RFPs). In these instances, potential clients are new relationships for you. Other times, you come to know potential clients through "warm handoffs." This happens when someone in your network (e.g., a colleague, former client, a friend) introduces you to someone who needs the services you offer.



Figure 10.2.1: Community Event

No matter how a potential client comes to you, building the relationship starts with a first conversation. If you are responding to a proposal, this conversation may start with the written proposal. Otherwise, the initial conversation is usually an exploratory call. Later, if you connect well and the potential client is interested in continuing to explore the possibility of working with you, you will schedule a discovery call. Next, we will explore this process.

10.2.1: The First Conversation (Exploratory Call)

10.2.2: How to Handle a Discovery Call

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10.2.1: The First Conversation (Exploratory Call)

Many evaluation consultants find potential clients at local events, conferences, or other networking opportunities. In other cases, someone may reach out to you via your website or through a mutual connection. Unless you are responding to an RFP that forbids contact with the funder, scheduling a first call with your potential client is the next step.



Figure 10.2.1.1: Author Ann Price with Client

The purpose of this first conversation is two-fold. It is the beginning of what will hopefully grow into a healthy and productive relationship, and it will help you and the potential client assess whether you are a good fit to work together. As in all relationships, the first phone call or face-to-face meeting will likely determine whether this is a one-off conversation or the start of an ongoing, hopefully fruitful relationship. If you have been connected to this person by a friend or colleague, be sure to remind the potential client of this connection. (Note: Always thank your friend or colleague and let them know you appreciate the warm handoff. After the meeting, follow up with them and let them know how it went).

To begin, try to find a connection, if possible. Do you both have children, love to travel, or are foodies? It may be trite, but it is also true that people hire people, not companies. Start by just relaxing and being friendly.

The one guiding principle to follow for the rest of your conversation is to listen more than you talk. To know if you are the right fit for each other, you need to explore and understand their pain points. Ask them, what keeps you up at night? This can be explored through a variety of questions:

- *What is most difficult for your staff?*
- *When you need to pull information for your end-of-year report or grant application, how hard is that?*
- *What kind of questions does your board want to answer? Can you provide them easily?*
- *What types of things are community members curious about? Doubtful about?*
- *What do you want to know or understand but don't?*

Listening to their struggles, you will understand their needs and discern if you have the skills and ability to help them. For example, if you are an evaluator, and they are clearly struggling with data collection and reporting, this is your opportunity to let them know how you have helped similar organizations. If their strategic plan has expired, and you offer those services, then you can share your approach and perhaps a story of how you helped develop an actionable strategic plan for another nonprofit. If they share a pain point that is in an area that you do not provide services, offer to make a connection with someone in your network who can help. No one can be all things to all people. You will build goodwill and show that you are a trustworthy partner who prioritizes their best interest.

Understanding the organization's evaluation, technical, and internal capacity is also important. Be sure to ask them about their

experience with evaluation. Do they have staff with technical skills (e.g., computer skills, statistical knowledge, Excel proficiency) to support the evaluation?

There are other things, not directly related to their needs or their abilities, that are just as important to having a successful client-consultant relationship. Make it your practice to explore their values and principles.

Values are the core beliefs and principles that guide decisions and behaviors of individuals and organizations. What values and principles guide the organization's work? How are they put into practice?

- *Where might you and the potential client differ in values?*
- *What are non-negotiables for them?*

If you differ in fundamental values such as equity, it might not be a relationship you want to pursue. You need to ask yourself, if we differ in values, will this be a problem for them or me later?

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10.2.2: How to Handle a Discovery Call

After some relationship-building, perhaps by meeting for coffee, in-person or virtually, or perhaps sharing a meal, you may be ready for a more formal conversation, often referred to as a *"discovery call."* By now, you are likely to have a good idea of your potential client's pain points and how you can meet their needs.



Figure 10.2.2.1: Meeting with Team

During this conversation, be sure to talk about:

Roles and Responsibilities

In my experience, the person who holds the authority for the project needs to be involved throughout the project. If the decision-maker signs the contract then passes off the project to someone else, be sure they are informed about the progress throughout the engagement. This will avoid the situation where the leader comes in at the end and is dissatisfied.

- *Who on the client side has the authority for the project?*
- *What staff will be involved in the development and implementation of the project?*
- *What is the technical capacity of the staff to support the evaluation?*
- *Explain the roles of any staff or subcontractors who will work on the project on your side.*

Continue to Explore their Pain Points

In the initial exploratory call with your potential client, you learned about some of the challenges their nonprofit or community organization is experiencing. During the discovery call, you want to dig deeper, exploring these challenges further and making the connection between the struggles they are having and the solutions you offer.

- *What is the problem that keeps you up at night?*
- *Where does your team struggle the most?*
- *What steps have you tried to solve the problem on your own?*
- *Have you worked with a consultant before? How did that go?*

Understand their Goals

To be successful, you need to understand the nonprofit's goals for the engagement. They may not fully understand, or they may think they know what they want and need, but may be misguided. Asking thoughtful questions will help them articulate their goals.

- *What goals or outcomes are you trying to achieve within your organization?*
- *What are some of the external or internal pressures that are motivating you to explore hiring a consultant currently?*
- *In thinking about your work, how would you know you are successful?*
- *If you were to write the last paragraph of your evaluation report, what would it say?*

Explore their Communication Preferences

Communication is the key to a healthy consulting-client relationship (see extended section on communication later in the chapter). Discussing how you will communicate will help set you up for success. If they prefer communicating via email and you prefer phone calls, you need to discuss and agree on how you will set up communication. If the potential client prefers in-person communication, and you are not local, you should discuss it before proceeding with a contract. If you have a team, be sure to designate the main point of contact.

Reporting is part of communication, and you should explore that too. For example, if you are working with a foundation that has a more formal operating style, they may prefer detailed meeting notes and status reports formatted in Microsoft Word. For clients with a less formal approach, high-level meeting summaries in a shared Google doc and monthly status updates via email may suffice. Consider asking:

- *How do they prefer to communicate (emails, virtual meetings, in-person meetings, etc.)?*
- *How often do they like to meet during an engagement?*
- *How do they handle conflict or disagreements (internally and with consultants)?*

Understand their Style

Style relates to communication, which includes formality of language and even dress at in-person meetings. If you have a more casual approach but your client is more formal, you may not be seen as "professional." To help understand their style, ask:

- *Does the potential client use a formal, corporate style of working, or are they more casual?*
- *What is the tone used in their social media and on their website (formal, funny, engaging, etc)?*
- *How does your style complement or clash with the preferred style of the organization?*
- *What is their preference for the format of status updates and reports?*
- *How do they prefer to work with consultants (as "experts" or advisors)?*

Understand their Limitations

Understanding the organizational constraints is critical to a successful relationship with community-based nonprofits. This is an area that some consultants avoid, but understanding constraints, particularly budget constraints, is important. You don't want to be in the situation where you propose a complicated project that is over their budget and/or doesn't fit the capacity of their staff to support the work. Some questions to ask about limitations include:

- *Who else needs to be involved in this decision?*
- *What are your budget considerations?*
- *What is the timeframe for deciding on whether to hire a consultant?*
- *What is the capacity of the staff to support this work and how?*
- *What is their policy on AI?*

Understand their Goals

Effective consulting starts with understanding what a nonprofit hopes to achieve and whether the solutions you are discussing will actually help. Be aware that clients do not always fully understand their needs, so good questions can clarify their goals and

point to the most useful scope of work.

The stated scope should be treated as the start of a diagnostic conversation, not the final definition of the work. Sometimes a small adjustment is enough (they ask for a logic model, but they actually need a Theory of Change); other times, the client needs a different engagement altogether (they ask for a survey, but what they really need is a full evaluation plan). Listening carefully and naming that gap can build trust by showing that the consultant is focused on real needs rather than simply agreeing to the initial ask. Consider exploring:

- *What goals or outcomes are you trying to achieve?*
- *What internal or external pressures are leading you to seek consulting support now?*
- *How will you know this work has been successful?*
- *If this engagement goes well, what would you want the final report to say about your organization or program?*

Set Boundaries

Scope creep (the expansion of project goals, tasks, and/or deliverables outside of the contract) is something you will experience during your career as a consultant. Discussing this upfront is wise. If later changes are needed, it is advisable to require a signed change order document that defines the requested change, and includes compensation for added or revised tasks.

- Set boundaries about “emergencies.” One consultant we know charges double her normal hourly rate for tasks or products the client needs that are outside of her original contract that require a quick turnaround or weekend work. It is not something that has been requested often, but when it has, this boundary has been set and respected.
- Discuss budget and payment schedule. Although discussing money and payment is something many people are uncomfortable with, you must develop this muscle if you are to operate as a business. Don’t be shy about asking for their budget. If their budget is low and the list of deliverables is long, you will know right away that further discussion is needed. You will need to either agree to reduce the tasks and deliverables or expand the budget. If the potential client can’t adjust or is unwilling to do so, be sure to explain the issues and potential pitfalls and refer them to someone else. A low-budget, not-too-technical project would be a good opportunity for a student or new consultant looking to build their portfolio.

A Final Tip for Your Discovery Call

Be sure to listen more than you talk. Listen deeply and practice reflective listening. Be brief and let them know you will follow up with them in a few days. At that time, share a resource you have developed, a podcast episode, or an article that might be helpful to them. The goal is to be helpful and continue developing the relationship.

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10.3: CLOSING THE CONTRACT

Getting a new client or project may happen quickly after the discovery call, or not. In my experience, there is almost always a lag (sometimes several months) between when a prospective client reaches out and when you close a contract or are told no.

As I mentioned earlier, during the discovery call, you will want to identify who in the organization has decision-making authority for the project. The decision-maker should be involved in the conversations that lead to defining and signing a contract. Otherwise, you may be in a difficult position of communicating with the staff member who manages the project but is required to communicate up the organizational chart, convincing them that the project is worth investing in and you are the right person for the job.

Now it's time to come to an understanding by formalizing expectations about the scope of work. Clear up any lingering questions about the project goals, specific deliverables, timelines, methods, participants, and success criteria. These are the elements that will go in your contract.



Figure 10.3.1: Closing the Contract

Ask how often you will communicate and how, and be sure to ask what staff will participate in team calls. Be sure to get everyone's contact information and keep the list updated. Typically, we host team meetings one time a month for larger projects and once per quarter for smaller projects. Agree on how you will document key decisions, track action items, and share meeting minutes via a shared folder or email.

Clearly specifying these elements will ensure that your client-consultant relationship remains collaborative and enjoyable for both of you.

10.3.1: When to Walk Away

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10.3.1: When to Walk Away

Not every conversation does or should end in a contract. There are times when you need to walk away. If you are new to consulting, you may be tempted to accept each opportunity that comes your way. However, sometimes the best move is to decline the engagement. Remember that your reputation is one of the strongest tools you have to build your business. Many consultants will attest to the fact that referrals and repeat clients are their main sources of new business.

Here are some examples of situations in which you might decline the work:

Example 10.3.1.1

- The budget-scope gap that won't close: The client needs a 12-month, complex, mixed-methods evaluation and has $5,000. You've offered to re-scope; they won't budge on either the deliverables or the budget. At that point you're either undercharging in ways that hurt your business and set bad precedent (remember, clients talk to each other) or you're committing to work you can't do well. Either outcome will set you up for failure.
- The organization wants the evaluation to report their predetermined conclusions, all positive. This happens when the organization is under pressure by a funder relationship, a program is politically protected or favored by the staff or community, or the leadership has already told the board what the evaluation will find. If a client is signaling, explicitly or you pick up on this in your initial calls, you should consider turning down the engagement. You don't want to be in the position of walking away from a contract after the engagement begins, though if you feel pressure to comply with predetermined conclusions, you might have to. In that case, walking away from a contract protects your professional integrity and potentially the communities the data is supposed to serve.

In my experience, evaluation is always an organizational intervention. Serious organizational dysfunction can sometimes, but not always, be evident during initial conversations. For example, I always ask if they have worked with a consultant previously, and if they have, I ask how that relationship worked or didn't work for them. If things seem OK at first but later you notice key staff turnover, the Executive Director and board are in open conflict, or the point of contact has no actual authority, take note. These are signals that all is not well in the organization. You can name what you're observing and give them a chance to address it, but if nothing changes, withdrawing from the contract may be your only option.

Sometimes, you have value conflicts that can't be reconciled. This can happen in an intervention you have an ethical problem with, or the client wants to collect data on community members in ways you find extractive or harmful, or they want findings framed in ways that could damage the community they serve.

In some cases, you know you are not the right fit, or they are not ready (yet) for evaluation. This may happen when the work is outside your genuine expertise. For example, they need someone who is experienced in complex quantitative longitudinal analysis, and you are not experienced in conducting that level of analysis. You might also find situations where a marginalized community needs a consultant that truly understands their community, and you don't have the experience or background to do their work. They may ask for one thing, for example, an evaluation, but what they really need is a strategic plan. They may want an evaluation now, but it is clear the program is unstable, or they don't have the capacity to do the work. In these cases, it is best to be clear and provide your opinion on what would best serve them. In these situations, if you can't agree on the work or if you are not the right person, the ethical move is to make a referral, even if the budget is attractive.

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10.4: How to Maintain Trust and Credibility



Figure 10.4.1: Landed the Contract!

You have landed the contract! Now it's time to get to work. Make it a practice to have an onboarding meeting with your new client. Everyone with a major role should participate. This includes both consultants and anyone on the client side who is a decision-maker or has a lead role in implementation or data collection. During the onboarding meeting, review roles and responsibilities. It is good practice to review the agreed-upon tasks and project timeline. It is not unusual for some scheduling issues that need to be worked out. During this meeting, it is a good idea to get permission to share product examples or project work on your website, at conferences, and on social media. If you have not already done so, discuss various types of Artificial Intelligence (AI). Understand the client's internal policies about the use of AI. If you intend to use it, discuss guidelines about using it to develop products, analyze data, design reports, etc.

Client-consultant relationships are like any other relationships; they require care, attention, and clear communication to keep them healthy. Be honest about challenges that arise and address them early. Do not let miscommunications grow into larger issues. During your initial meeting or early on, discuss how you will address problems that arise. Establish escalation and issue-resolution processes and follow them. Hopefully you won't ever need to have a difficult conversation, but it's best to be prepared.

Maintaining good, trusting relationships is simple. Provide a high level of support by delivering all contracted tasks and deliverables on time. Communicate clearly by providing meeting minutes, promptly responding to emails and phone calls, and anticipating and handling potential challenges. Always make sure you maintain strict confidentiality and do not share any client information without permission. Base your advice on evidence and sound professional judgment. Follow these guidelines, and you are likely to have a long, mutually beneficial relationship.

Understanding a Client's Organizational Culture

A strong consulting relationship depends in part on understanding a client's organizational culture: the shared values, beliefs, behaviors, and unspoken rules that shape how people work, make decisions, and relate to one another. Put simply, culture is often "the way things are done around here."

For consultants, it helps to pay attention to the following:

- Visible signs of culture include office layout, dress codes, rituals, meeting habits, and the language people use every day.
- Less visible parts of culture include what gets rewarded, how conflict is handled, whether hierarchy is followed or challenged, and how much risk people are expected to take.

- Culture develops over time through the founders' vision, the organization's history, leadership, industry pressures, and everyday habits. Because of this, it usually changes slowly.
- Culture affects performance, retention, innovation, trust, and morale. A healthy culture can support accountability and psychological safety. An unhealthy culture can quietly weaken strategy and relationships.
- There may be a gap between what the organization says it values and what people actually experience. That gap can offer useful information, not just a warning sign.
- Consultants should adapt to a client's culture without getting pulled too far into it. In some cases, it also helps to set clear norms for your own work, such as how meetings will run and how decisions will be made.

One useful way to think about this is that strategy tells an organization *what* to do, but culture often shapes *whether* and *how* that work actually happens. For consultants, that means learning the history and context that shaped the organization, paying attention to the dynamics among staff, leadership, and board members, and adjusting your approach as needed. The goal is to understand the culture well enough to work effectively within it, without getting caught up in its internal dynamics.

Even with thoughtful preparation, challenges can still come up. In one engagement, a client said they were ready for an inclusive, participatory process. We involved leadership, the board, staff, and the people they served. Even so, signs of misalignment showed up throughout the work, including repeated pushback during strategy development. After we delivered what everyone had agreed would be the final product, leadership changed it. Over time, we realized there were deeper organizational issues than we had first understood. Experiences like this are a reminder that even a strong process and careful attention to culture do not guarantee the outcome you hoped for. The important thing is to learn from the experience, give yourself grace, and keep building your skill and judgment over time.

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10.5: Prioritize Effective Communication

As mentioned earlier, effective communication is the backbone of any successful professional relationship. Whether you are working with clients, collaborators, or colleagues, consistent and clear communication prevents misunderstandings, builds trust, and keeps projects moving forward. The following practices will help you maintain communication, helping build meaningful connections with your clients.

Establish and Maintain Regular Communication

Whether you use email, scheduled video calls, in-person meetings, or a project management platform, the communication method you use matters less than establishing consistent communication. With your client and team, discuss which method works best, then establish a cadence. Decide on weekly check-ins, bi-weekly updates, or monthly reviews, and hold to it. When communication is predictable, people feel informed and aren't left wondering about progress or next steps. Avoid switching between platforms unnecessarily, as this creates friction and leads to missed messages.

Take and Share Client Notes After Every Meeting

Every meeting generates decisions, action items, and a history that can easily be forgotten. Make it a habit to capture notes during or immediately after each conversation, then share them with the relevant parties within 24 hours. A well-written summary that covers what was discussed, what was decided, and what each person is responsible for next, creates a shared record that keeps everyone informed. It also demonstrates professionalism and respect for each participant's time, which allows them to correct any misunderstandings before they become problems.



Figure 10.5.1: Client Meeting

Maintain a Shared Folder for Team Collaboration

A shared, well-organized folder is one of the simplest tools for keeping an evaluation team aligned. Store all relevant documents, briefs, deliverables, and reference materials in one centralized location that everyone can access. Use a clear naming convention and folder structure from the start, and make sure everyone knows where to find things and where to put them. This removes the constant back-and-forth of "Can you send me that file?" and ensures that team members are always working from the latest version of a document. Cloud-based tools such as Google Drive, Notion, Dropbox, or SharePoint make this especially straightforward to set up and maintain. Define how and where files will be shared within the team and with the client before entering into a contract. Be sure you also discuss data sharing and storage and include this in your contract.

Translating Complex Ideas into Clear, Accessible Language

One of the most valuable communication skills is the ability to explain a complicated concept in plain terms. Jargon, technical shorthand, and industry acronyms may feel efficient among specialists, but they create distance when speaking with clients or stakeholders who do not share the same background. Before presenting a complex idea, ask yourself: how would I explain this to someone encountering it for the first time? If you can't explain it so that your friend, not involved in the work, can understand it, keep working. Use analogies, metaphors, images, concrete examples, and straightforward language. This is not about oversimplifying. It is about building shared understanding, which is the foundation of good collaboration.

Practice Active Listening to Understand Underlying Concerns

Communication is not only about what you say, but also about how well you listen. Active listening requires your full attention. Resist the urge to formulate your response while the other person is still speaking. Ask clarifying questions to ensure you have understood correctly. Use reflective listening.

Example 10.5.1

If a client expresses concern that staff is too busy to be involved in data collection, you might say: *"What I hear you saying is that you are concerned about the burden the data collection will place on staff."*

Remember that people often express surface-level requests when they are trying to voice a deeper concern. A client who says *"I'm not sure about this design"* may really be worried that the evaluation plan does not capture the data in a way that respects their participants. By listening carefully and probing gently, you can address what truly matters rather than what is merely stated.

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10.6: Professionalism and Ethical Considerations for Consultants

Consulting is, at its core, a relationship built on trust. Clients invite you into their organizations, share sensitive information, and act on your recommendations — often with significant consequences. That level of access and influence carries a serious ethical responsibility. The following principles define the ethical standard every consultant should uphold, not because they are required to, but because integrity is what makes the work meaningful and the relationships durable.



Figure 10.6.1: Strong Client Relationships

Avoid Conflicts of Interest

A conflict of interest (e.g., you have donated to the organization, have a significant relationship with a board or staff member), whether real or perceived, undermines the foundation of the consulting relationship. Before accepting an engagement, examine your existing relationships, financial interests, and prior work for competing or related parties. If a conflict exists or emerges during the engagement, disclose it to the client immediately and without hesitation. In some cases, disclosure is sufficient; in others, the ethical course is to step back entirely. Clients are placing their trust in your objectivity, and that trust cannot coexist with undisclosed interests that could color your judgment.

Provide Honest and Objective Advice

The most valuable thing a consultant offers is an honest outside perspective. That value collapses the moment advice becomes shaped by what the client wants to hear rather than what the situation demands. Ethical consultants deliver difficult findings clearly, flag risks even when doing so create tension, and resist the pressure to soften conclusions to protect the relationship or secure future work. Telling a client what they need to hear, especially when it is uncomfortable, is not a failure of tact. It is the highest form of professional respect.

Respect the Client's Time, Budget, and Resources

Every hour billed and every dollar spent represents a real cost to the client's organization. Ethical consultants treat those resources with the same discipline they would apply to their own. This means scoping engagements honestly, avoiding unnecessary meetings or deliverables, and never recommending work that exists primarily to extend the engagement. Scope creep driven by self-interest is an ethical breach, not merely a project management issue. When a consultant consistently

delivers focused, purposeful work within the agreed parameters, they demonstrate that their interests and the client's interests are genuinely aligned.

Maintain Strict Confidentiality

Consultants are routinely entrusted with proprietary information, internal challenges, personnel matters, and strategic plans that the client would never share publicly. That information must be protected without exception. They should not be referenced in other proposals, shared with other clients, and or used for personal reasons. Confidentiality should be formalized in every engagement through clear contractual agreements, but the ethical obligation runs deeper than the legal one. Even when no agreement is in place, a consultant of integrity handles client information as if the highest standard of discretion always applies.

Be Transparent About Your Capabilities

Overstating your expertise to obtain work is one of the most damaging ethical failures a consultant can commit. Clients make decisions, sometimes significant ones, based on their belief in your qualifications. If an engagement requires skills or knowledge you do not genuinely possess, the ethical response is honesty: acknowledge the gap, bring in someone better suited, or decline the work entirely. A reputation built on transparency about what you can and cannot do is far more sustainable than one constructed on overpromising. Clients remember who was straight with them.

Avoid Creating Unhealthy Dependency

A consultant's goal should be to leave the client stronger than they found them — better equipped, more capable, and less reliant on outside help for things they could handle internally. Structuring engagements to maximize billable hours at the expense of building client capability is self-serving and ultimately harmful. Ethical consultants share knowledge freely, document their methods, and measure success by the client's growing independence. The best professional relationships are ones where the client returns by choice, not because they were never given the tools to move forward on their own.

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10.7: Stay Clear of Internal Politics

Consulting work usually involves interviews, surveys, and honest conversations with people across an organization. People open up because they trust you to handle what they share with care. Your job is to protect that trust. Do not attach names to sensitive feedback without permission; do not let internal conflict shape your conclusions, and do not mistake one person's frustration for the whole story. How you handle private information says a lot about your professionalism.

You will run into internal politics. That is just part of the work.

This comes up a lot in nonprofits and community organizations, where consultants are often brought in when things already feel tense or uncertain. A strategic plan may be stuck, an evaluation may be tangled up in disagreement, or a leader may want an outside voice to back a decision that is already made. It helps to know that going in instead of figuring it out halfway through the project.

Common Signs to Watch For 

- Different people tell very different versions of the organization's priorities or history.
- Someone pulls you aside before or after a meeting to share "what is really going on."
- People who should be in key conversations are missing.
- The purpose of the project seems to change depending on who is talking.
- People are especially eager to talk about someone else's mistakes.

Listen Carefully, but Stay Grounded 

People will often tell you their frustrations because consultants are seen as neutral listeners. Listen with care, but stay clear about your role.

- Be warm, present, and respectful. People need to feel heard, and what they share may be useful.
- Keep in mind that you are hearing one point of view, shaped by that person's role and experience.
- Do not signal agreement with one person's version of another person or team.
- Assume that anything you say could get repeated, and speak with that in mind.

Do Not Take Sides, but Do Name Patterns that Affect the Work 

Staying neutral does not mean pretending you do not see what is happening. If a pattern is clearly affecting the work—for example, leaders are not aligned, staff input gets dismissed, or honest feedback is not welcome—that matters. Your job is to name the pattern clearly and professionally, not to join a side.

Here is the difference:

- **Taking sides** means lining up with one group, repeating their complaints, or letting their agenda shape your findings.
- **Naming patterns** means pointing out what you keep seeing when it affects the work, using clear observations instead of personal judgments.

When a client changes direction late in the process or starts revising what was already agreed, take it as a sign to pause and reset expectations. Confirm the original agreement in writing, clarify what changed, explain what it means for scope or timing, and identify who has final decision-making authority. A lot of this can be caught earlier by documenting decisions and checking

alignment at key points along the way.

Not all Dysfunction is the Same 

- **Normal friction:** Competing priorities, slow decisions, stretched staff, and imperfect communication. This is common. Build in extra time and keep communicating clearly.
- **Problems that affect your work:** Leadership turnover, unclear authority, repeated delays, or a point of contact who cannot actually move the work forward. These issues should be raised diplomatically with someone who can address them.
- **Conditions that make good work impossible:** In rare cases, the organization is so unstable that meaningful consulting work cannot happen. When that is true, the most honest thing you can do may be to say so and explain what would need to change before the work can succeed.

Protect Yourself 

New consultants do not always realize how easy it is to get pulled into organizational conflict. Even when you do nothing wrong, being seen as aligned with one side can hurt your credibility. A few habits can help:

- Document key decisions and agreements in writing.
- If your process allows it and everyone agrees, record meetings so you have a clear record.
- When you sense competing agendas, bring the right people into the same conversation instead of managing separate versions of the story.
- If someone pressures you to shape findings a certain way or share confidential information, address it directly and restate your responsibility to maintain trust.

Honor Your Commitments 

Deadlines, deliverable quality, and agreed scope are not merely contractual obligations — they are ethical ones. When you commit to a timeline or a standard of work, the client builds their own plans around that commitment. Failing to follow through, or doing so without early and transparent communication, signals that your word cannot be relied upon. When circumstances change, and a commitment genuinely cannot be met, the ethical response is to raise it immediately, explain the situation honestly, and propose a path forward. Proactive honesty about problems is far less damaging than silence followed by a missed deadline.

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10.8: Managing Change and Resistance

Change can be hard, even when everyone is working toward something positive. Clear communication helps a lot, but it will not make every concern or disagreement go away. Some pushback is normal. When it happens, it is often more helpful to stay curious, listen closely, and understand where the concern is coming from.

For new consultants specifically, it can help to make this guidance feel a little more practical and grounded. Rather than simply saying to welcome resistance and communicate through it, you can offer a few clear steps people can turn to when challenges arise.

- Start by checking your assumptions. Before labeling something as resistance, pause and ask whether your expectations are realistic. Some nonprofit leaders may need more support reading charts or turning data into action. In those moments, it may make sense to slow down, explain things more clearly, or build in some basic data support. Sometimes the best next step is simply taking a step back.
- Bring others in thoughtfully. If progress starts to stall, it can help to involve the Director or point of contact early. This gives you a chance to share what is going well, where things feel stuck, and what kind of support might help. They can decide how to respond, and that is an important part of their role.
- Keep authority in mind. In some nonprofit settings, a point of contact may not have the authority, or may not feel comfortable, holding others accountable. When that happens, consultants can ask the point of contact to join a meeting, set up a one-on-one conversation with the person who is pushing back, or bring in someone with more decision-making authority.

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10.9: Add Value

Most successful consultants will tell you that most of their clients come from referrals from past clients. To have the level of trust that brings clients back year after year, you must deliver and then over deliver. By this I mean that your communication, products, and reports all need to be of high quality and bring value and usefulness to the client. Throughout the relationship, you will have many opportunities to add value. When sharing initial findings in a data-sharing meeting, for example, ask for client/focal group interpretation. Focus on outcomes and use, not just deliverables.

Our largest client provides case management and support services to students in 15 under-resourced schools in rural Georgia. It is a complex project. The client runs a state-wide network with multiple funders, numerous partners, and training they provide to the network, among other responsibilities. Over time, as our relationship has developed and my team has demonstrated our facilitation skills, we expanded our evaluation support and now lead participatory training for sites and lead a Community of Practice for local site coordinators and Executive Directors.

Before finalizing a report, co-create recommendations and work together to ensure recommendations are practical and implementable. Each year we facilitate an in-person meeting for this client to reflect on project findings. Even though we met in person, this process could be done virtually. Our process started with reflection. We asked participants to think through questions individually, including:

1. *What contributed to our success?*
2. *What are we most proud of?*
3. *What were the challenges we experienced?*

Then we placed a large sheet of paper on the wall and mapped the following:

High Points	***Low Points***	***Learning Moments***
↑ What went well	↓ Challenges encountered	💡 Key takeaways
↑ What they are proud of	↓ Roadblocks	💡 New skills acquired
↑ What they enjoyed	↓ Things that didn't go as planned	💡 How they adapted to challenges
↑ Other positive experiences or accomplishments	↓ Other areas they would like to improve or address	💡 Other lessons learned or insights gained

Figure 10.9.1: Mapping of Reflection Questions

Next, we posted key findings on a wall (Similar to a Data Walk) and asked participants to provide feedback using sticky notes. Our discussion focused on what we are learning from:



Figure 10.9.2: Participant Feedback on Program Outcomes, Success, Challenges

We ended the closeout session by discussing:

1. *Which of these are priorities/doable?*
2. *How can we help you move forward with these priority recommendations?*

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10.10: Exit and Handover

Eventually, consulting engagements will end. Strive to build client capacity to do the work rather than dependency. Leave your client with processes, tools, and templates they can use independently once the contract ends, which leaves the organization stronger than before you started working with them. They may need support with the more technical aspects of an evaluation, unless they hire an internal staff person to fulfill this role, and they will likely hire you in the future if you cultivated a strong relationship with them.

Lastly, let's touch on the end of the project report. As discussed earlier, you need to confirm report expectations in early discussions so that you understand the clients preferences and these are detailed in a contract. If a funder requires a “traditional report,” you need to know that. But we find the days of long reports, for the most part, are gone. We practice creative reporting and use compelling data visualizations. We also develop 1-pagers for our clients’ specific audiences and often use PowerPoint instead of Word for our close-out report. We have even developed social media posts. Some consultants offer web-based reports.



Figure 10.10.1: Exit and Handover

Projects will come to an end at some point. As part of the learning process, plan for a structured, professional exit that benefits you, your business, and your client. It is good practice to include the close-out meeting in your proposal and budget. The close-out meeting helps to ensure knowledge transfer, though this is not a guarantee. An exit meeting also documents lessons learned and reveals any next steps the nonprofit might consider. Here are some tips for an effective closeout meeting:

- Develop a clear agenda that includes a review of all tasks and deliverables
- With the client and any other key participants, have a “Do Well. Do Better.” conversation. This process is quite simple. Ask the group two simple questions:
  - What did we do well? What could we have done better?
  - Then ask everyone to respond. Before you start, this is a good time to share the communication principles you have developed.
  - I once did the *Do Well. Do Better* process with a client but did not let them know we were doing it. They were defensive, and the meeting didn’t go as well as I hoped. In the end, it was fine, but it was a good reminder that people often have evaluation anxiety, even when we have worked with them for a time. Always let people know what to expect and remind them our goal is to learn, not to make personal judgements.
- Leave the client stronger and more self-sufficient than when you started working with them.
  - Provide feedback on how their evaluation capacity has grown.
  - Be sure that you have developed evaluation tools, like surveys, rubrics, and data collection spreadsheets. We sometimes provide videos that explain how to use these tools so that clients can refer to them or share with new staff members that may join the organization after our engagement ends.
- Be sure to ask for a testimonial for your website and to use it on social media. If you use a client survey, this is a good

time to ask for feedback.

- Make it a practice to check in with your client in a few months and follow up.
  - Ask how things are going and if they have any challenges with the evaluation process or any new needs that have arisen.
  - Periodic check-ins help maintain the relationship, and you never know; they may have areas or new funding you could support in the future.

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10.11: Conclusion

Strong consulting relationships do not happen by accident. They are shaped by trust, communication, and integrity. They are strengthened and sustained by deep listening, clear expectations, ethical decision-making, and attention to how the work is experienced by everyone involved. While contracts provide structure, it is the quality of the relationship that determines whether work feels collaborative or transactional. The most meaningful consulting work builds clients' capacity to think critically and make informed decisions, enabling them to use new knowledge to strengthen their programs, strategies, and their organizations.

A Moment to Reflect

As you think about whether consulting might be right for you, these questions are meant to help you pause and imagine what stepping into client relationships like these would actually feel like.

1. *How comfortable are you building professional relationships?*
2. *How will you establish trust and credibility with potential clients*
3. *How do you tend to respond when expectations are unclear or evolving? Take a moment to plan an initial conversation to clarify what a potential client needs or wants.*
4. *What would a "good consulting relationship" need to look like for you to feel successful?*
5. *What early signs might you look for in a client relationship that is working well? What early signs might you look for in a relationship that it might not be a good fit?*

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10.12: Resources

Here are some suggestions for additional resources on consulting:

Websites and Virtual Resources

- American Evaluation Association**,** take advantage of the e-studies and coffee break webinars.
- Independent Consulting Chats (IC Chats), led by Matt Feldman and open to all AEA members, weekly facilitators present topics helpful to those interested in starting or building an evaluation practice. Past meetings are available on YouTube. They are held virtually at 12 PM EST on Thursdays. Find the IC Chat and more resources on the IC TIG's website.
- Better Evaluation, particularly their resource for Building a Career in Evaluation.

Books

- Wolfe, S.M. & Price, A.W. (2023). *A Guidebook for Community Consultants: A Collaborative Approach*. Cambridge University Press**.**
- Barrington, G. (2011). *Consulting Start-up and Management: A guide for Evaluators and Social Scientists.*
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Podcasts

- The Evaluation Couch: Maria Montenegro hosts this upbeat and useful career and business podcast for evaluators. Episodes feature interviews with independent practitioners who share real-world advice on launching a business, navigating market shifts, and finding community. Listen via Apple Podcasts or Spotify.
- Grounded in the Equitable Evaluation Initiative, the Equity in Evaluation Podcast Series offers actionable help if your practice focuses on nonprofits, philanthropy, and social justice. It features the history and practical implementation of equitable frameworks. Listen on ImpactED.

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