

# **Working with Consultants**

## **Amy Reisch, First 5 Marin**

## **Jara Dean-Coffey, jdcPartnerships**

Interview 10/24/12

### **1. What resulted from the consulting project that was transformative?**

**Amy:** First and foremost, from early on in the relationship with Jara, the Commission was able to solidify its thinking about the future and strategically and thoughtfully considered the best approach on how to best use First 5 resources in the community. That was transformative. The methodology and communication tools that Jara used to help us understand concepts, and also helped us to visualize outcomes for the future. This in turn allowed us to work with our partners helping them to think about their work in that context. Although we are required by statute to do an annual evaluation, the statute didn't specify what it had to look like. And our Commission and Jara worked on developing an evaluation that reflected its commitment to change and focus on outcomes.

**Jara:** The Commission searched for an evaluation consultant before hiring me. They had figured out that they didn't want to just tally up widgets, they wanted someone to work with them collegially about difficult concepts in simple and concrete way. The relationship began from scratch. There was an implicit desire to engage in an evaluative way to be helpful to them.

This was 12 years ago. The idea of an evaluation consultant working in partnership to develop this work (and informing strategy) was fairly novel at the time. The evaluation framework has evolved as the Commission has evolved. If you look at any of the first graphs, the application that was used (even how it looks) shows how much change has happened over time. The Commission now holds the work of evaluation, understanding what difference the Commission has made, how will they find out, all very close. It's not just driven by "is this good work?" but a more sophisticated question "of are we having an impact, where and how in what ways?" They bring that understanding into their other day jobs as well and thinking in this way has transformed them as individuals and agents of change.

Another example is, when we first started doing the work, the traditional relationship between funders and grantees was for funders to ask for logic models and funded partners to get technical assistance and capacity building to better engage in the evaluative work that funders wanted them to do. Over time, in the third year, we now have an evaluation workgroup, comprised of staff and external stakeholders. The Commission's work has broadened, as a larger body and is influencing change, and how those they're funding are influencing change. This has evolved because the Commission's work has changed. Once the capacity has taken

hold, then we shift. Shift resources to another area to move the work forward. The work is organically evolving, so what we do need to shift along with it.

## **2. How was First 5 Marin "ready" for this project?**

**Amy:** We had started out in an open place. The Commissioners didn't have a fixed idea or agenda about what the evaluation of their work should look like. So that provided a fertile field. One of the very first things we established were some basic principles by which we would work. Those principles have really informed our work over the past 11 years and pushed us along the way to question, to think differently, engage with each others on what they were doing, check in on whether we were on the right path, were we meeting those principles, moving toward those outcomes? They provided the grounding for the work. Then the theory of change and logic models for partners developed along the way.

With a shared set of principles to guide the work, we were able to test and reaffirm them every time we looked at the work and/or made decisions. On the website, on all of our frameworks, strategic plans documents produced used these principles. They are imbedded in all of our documents, in an ongoing way, and in our discussions. For example, when we knew we would focus and narrow our long range plan even more with fewer resources, meaning ending funding for a number of programs, one of the most important set of criteria for reducing funds were those principles. That really informed our organization.

**Jara:** They really come from a strong sense of self, they (Commission) know who they are, have a sense of values and are driven by impact. I helped them put a frame around that. They wanted to make a difference – they are not just about learning nor are they threatened by learning, they hold a genuine curiosity. I can push them but only within the bounds of their stated values. Looking at impact allows you to go to so many different places. It's like a tree with deep roots; it can just flow in the wind, able to bend not break, and remain rooted.

Amy and I are friends; it's not necessarily the best path for all consultants. The work we do and the way in which I work, affords a level of trust and ability to go different and deep places in our conversations. We've got each other's backs. Whatever I offer up is in the interest of the work and their stated strategic intention. We met when Amy was on her first day and the Commission was interviewing me and a colleague (under which the initial contract was held) to provide evaluation-consulting services.

## **3. What are two or three things that made your partnership tick?**

**Amy:** Friendship is indicative that our partnership is ticking. Respect for each other's intellect and ability. Being direct and honest and having great sense of humor. Being really passionate about the work, not just First 5, but the work of trying to change things that need to be changed. In essence, sharing values on a personal level.

**Jara:** Values and a broader sense that this work is important plus rigor and having fun with it. I value how Amy and the Commission go about their business. It is all about THE work, and how their work fits within that larger frame. Not every organization is interested in impact – attribution and contribution all contextualized within that larger context.

**4. Looking back, knowing what you know now, what's one thing you would have done differently?**

**Amy:** I don't know if I can think of anything.

**Jara:** No.

**5. Assuming Amy has worked with consultants before, what made this partnership with Jara different? More joyous? More impact? And, for Jara, you've worked with lots of social sector leaders, what made Amy stand out?**

**Amy:** There is one other consultant I've worked with for almost as long as with Jara. It's a good relationship as consultant / client, but not with the friendship as I have with Jara, and that's the case with all the other consultants I've worked. The friendship that Jara and I have developed speak to basic values and passion about the work, the broad work not just the Commission's. The notion of helping communities think about and organize themselves in ways that's the most helpful to them. Fostering change. That makes this relationship different. Other consultants have been far more focused on a particular task without a larger sense of the task; I may hold that, but not necessarily the consultant. That's not necessarily bad, but not lend itself to a long-term dynamic evolving relationship.

**Jara:** That kind of relationship is perfectly appropriate with everyone going back to doing the work. "Thanks very much, see you!" It's more transactional than transformative.

I have a special relationship with Amy that now spans over a decade. I'm clear about her intention for the county of Marin. It's not the easiest of places... she's managed to bring people into alignment. That value piece is really important. The openness and flexibility to "give it a try," not so tied to the strategies, as long as it impactful.

I have developed deep relationships with many of the clients (mostly the multi-year) over the years. First 5 is my first long term client and has become my biggest cheerleader. Our relationship affords us the ability to become more aligned, in sync, allows trust and pushing that you don't often get when it's transactional. It's essentially deeply based on social justice and equity. It can be hard for people to trust when working on an evaluation project, often because the work is so deeply personal. And, it's hard for people to trust because it (evaluation) feels threatening. When we have deep relationships, we can explore ideas, measures and metrics, tools because we get it, and together we figure out the best way to move forward. Evaluation is a tool that can be transformative, but often administered in a

transactional way, which is a disservice. Not everyone wants to engage in this work. They (the Commission) don't come from a place of fear, but from a place of "I really want to know, I really want to make a difference" which allows me as an evaluation consultant to push and challenge them. This relationship isn't for everyone.

## **6. How did you find each other?**

**Jara:** RFP released. Submitted a proposal. Back in the heyday of First 5 and the emergence of Prop 10.

**Amy:** I think, many big slick firms with bells and whistles were going for the RFPs, but didn't get what the Commission wants to talk about.

## **7. Advice to others?**

**8.**

**Amy:** Don't even look for a consultant until you and your board/commission/governing body, are very clear about what it is you want to assess, and have some idea of what outcomes, evaluation or whatever, you want to work towards. Don't even look for a consultant until you know it. Have some basic principles or values-- those things will help you craft RFP, and be helpful to your consultant about what it is you're being asked to do. To be a good client, you have to be clear what you're asking for. Thinking about your work, why do you want to evaluate, what do you think evaluation is, and what is it you're asking somebody to do for you. Evaluate your grantees, but how, and for what. You might need someone to help you do that. I don't get how an organization can do its work if you haven't thought about those things. Start with thinking about exploring that step from the beginning.

**Jara:** When we are least successful, we haven't tested alignment prior with values, approach and the role and use of the evaluation. We value alignment, and clarity with clients. If it's not there, we think about how to build it (the development of a common set of principles) into the scope of work. If not, then we have to decide if it's a party we want to go to.

**Amy:** In my previous work as a consultant rather than a client, I have found that, it is very important for the consultant to understand whether and/or how the governing body is informed in the process. Otherwise, you go in and do a bunch of work and it sits on a shelf otherwise. Respect in all of its forms.

**Jara:** If someone was afraid of something-- an evaluation consultant should make you feel good about yourself and be an objective cheerleader. If a consultant makes you feel stupid, and feel like you can't ask questions, then at the very least, you should be able to let them know that this is how you are feeling, or stop paying them and seek support elsewhere.

The relationship is a gift, a partnership to be invited to enter into an organization to help them do their work better, document their work and progress and be able to show others. It's important for consultants to have a sense of humility and honor, and it's just not something all

consultants hold. When you enter into someone else's home, you're a guest and consultants need to be mindful of that. You can be asked to leave at any moment in time. Sometimes you should leave if you can't serve the organization's mission. Have a sense of what you can bring, or of someone can do it better. That's about holding the work in a broader frame.

As a consultant, remember it's a business relationship and there is no "have to do this" on either part. A consultant needs to give client an out, which goes back to the respect piece. You may need someone else to do this and that's perfectly OK.

**Amy:** In addition to a business relationship, there may also be a friendship, which needs to understand/acknowledge that if the business relationship ends for whatever reason. That is not to say you can no longer be friends. It's important to hold multiple frames in a variety of ways, balance friendship and business, which are value-laden can be difficult.

I like Jara's other clients! They are strong social justice folks.

**Jara:** At its best, it's very enriching. That depends on how the consultants think about their work, transactional vs. transformative. Client portfolio has a thread. We renegotiate the contract every year, no assumptions, modify, and figure out how the work supports the changes.

**Summary:**

- Didn't have a fixed idea of what an evaluation should look like, so they started out in an open place but established basic principles. Principles remain steadfast as the work evolves and context changes.
- Jara and Amy have become friends, which works for the way they work together. This friendship is indicative that their partnership is working. They share values on a personal and professional level.
- Advice to others: do not begin to even look for a consultant until you are very clear about what you want to assess, and what underpins how you think about your work and impact and how you wish to use that information.
- A partnership with a consultant should have respect in all of its forms
- "Holding multiple frames in a variety of ways, balance friendship and business, value-laden can be difficult. "