

TESOL 2017, Seattle
Wed, March 22, 11:30AM

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Jayme Adelson-Goldstein, Deborah Kennedy

Making the Leap to Consulting

Agenda

- Overview of consulting in TESOL
- Brief thoughts on major issues
 - Marketing your services and obtaining clients — Anne Lomperis, lomperis@comcast.net
 - From contact to contract: helping clients figure out what they really need — Bruce Rindler, brindler@bu.edu
 - Designing and delivering training programs — Jayme Adelson-Goldstein, lightheartedlearning@gmail.com
 - Being flexible and responsive while maintaining work-life balance — Deborah Kennedy, deborah.r.kennedy@verizon.net
 - The business side: getting paid — Joe McVeigh, joe@joemcveigh.org
- Small group discussion by topic area
- Wrap-up & exchange of contact information for those who would like to network

Handout

A complete, 8-page handout can be downloaded from this web page: www.joemcveigh.org/resources
Scroll down to the section on Personal and Professional Development.

The handout includes a list of hyperlinked resources on consulting, needs assessment, marketing, training, standards, and pricing. In addition, the handout include tips on consulting from the presenters, questions to ask yourself about your business model, a set of best practices for the process of developing workplace language training, and short bios and contact information for the presenters.

Professional Fee Survey

In the same location, find the results of a quick and dirty survey of ELT consultants to see how much they charge for their services, and how they go about structuring payment from clients.

Resources for Independent Consultants

Consulting

- Bellman, G. (2001). *The consultant's calling: Bringing who you are to what you do* (2nd ed.). San Francisco: Jossey-Bass.
- Biech, E. & Swindling, L. B. (2000). *The consultant's legal guide*. San Francisco: Jossey-Bass/Pfeiffer.
- Biech, E. (2007). *The business of consulting: the basics and beyond* (2nd ed.). San Francisco: Jossey-Bass/Pfeiffer.
- Biech, E. (2009). *The consultant's quick start guide: An action plan for your first year in business* (2nd ed.). San Francisco: Jossey-Bass/Pfeiffer.
- Block, P. (2011). *Flawless consulting: a guide to getting your expertise used* (3rd ed.). San Francisco: Jossey-Bass/Pfeiffer. Check Amazon etc. for inexpensive earlier editions.
- Friedenberg, J. E., Kennedy, D., Lomperis, A., Martin, W., Westerfield, K. , & Van Naerssen. (2003). *Effective practices in workplace language training: Guidelines for providers of workplace English language training services*. Alexandria, VA: TESOL. Read the introduction and an overview here: <http://bit.ly/2lVb3dP>
- Gendelman, J. (1995). *Consulting 101: How to succeed as a training consultant*. Alexandria, VA: ASTD Press
- Lewin, M. D. (1995). *The Overnight Consultant*. New York: John Wiley & Sons
- Martin, W. M. & Lomperis, A. E. (2002). Determining the cost benefit, the return on investment, and the intangible impacts of language programs for development. *TESOL Quarterly*, Vol. 36, No. 3, 399–429.
- Nelson, B. & Economy, P. (1997). *Consulting for dummies*. Foster City, CA: IDG Books.
- Phillips, P.P. (Ed.). (2006). *Building a successful consulting practice*. Alexandria, VA: ATD Press.

Needs Assessment

- Brown, J. (1995). *The elements of language curriculum: A systematic approach to program development*. Boston: Heinle & Heinle.
- Freeman, D. (1989). Teacher Training, Development, and Decision-Making. *TESOL Quarterly* 231, pp. 27–45). This article explains the Knowledge, Skills, Attitude, Awareness model for helping organizations understand what individuals need to move forward.
- Kaufman, R. & Guerra-López, I. (2013). *Needs Assessment for Organizational Success*. Alexandria, VA: ATD Press. First chapter available free here: <http://bit.ly/2mcvd3R>
- Reeves, N. & Wright, C. (1996). *Linguistic auditing: A guide to identifying foreign language needs in corporations*. Clevedon, UK: Multilingual Matters.

Training

- Biech, E. (2005). *Training for dummies*. Hoboken, NJ: Wiley.
- Biech, E. (2015). *Training and development for dummies*. Foster City, CA: IDG Books.
- Lucas, R.W. (2006). *The creative training idea book: Inspired tips and techniques for engaging and effective learning*. New York: AMACOM.
- Silberman, M. & Biech, E. (assisted by Auerbach, C.). (2015). *Active training: A handbook of techniques, designs, case examples, and tips* (4th ed.). Hoboken, NJ: Wiley.
- Stolovitch, H. D. and Keeps, E. J. (2011). *Telling Ain't Training* (revised edition). Alexandria, VA: ASTD Press.
- Thiagarajan, S. (2005). *Thiagi's interactive lectures*. Alexandria, VA: ASTD Press.

Facilitating

- Butler, A.S. (1996). *TeamThink: 72 ways to make good, smart, quick decisions in any meeting*. New York: McGraw-Hill.
- Campbell, S., & Liteman, M. with Sugar, S. (2006). *Retreats that work: Designing and conducting effective offsites for groups and organizations* (revised edition.). San Francisco: Jossey-Bass/Pfeiffer.
- Putz, G. B. (2002). *Facilitation skills: Helping groups make decisions* (2nd ed.). Bountiful, UT: Deep Space Technology Company.

Benchmarks and Standards

- American Institutes for Research. (2016). *English Language Proficiency Standards for Adult Education*. Washington, D.C.: American Institutes for Research. <https://lincs.ed.gov/publications/pdf/elp-standards-adult-ed.pdf>
- CEA. (2017). *CEA Standards for English Language Programs and Institutions*. available here: <http://cea-accredit.org/about-cea/standards>
- Healey, D. & Hanson-Smith, E. (2011). *TESOL Technology Standards: Description, Implementation, Integration*. Alexandria, VA: TESOL Press.
- Pimentel, S. (2013) *College and Career Readiness Standards for Adult Education*. Washington, D.C.: Office of Career, Technical and Adult Education. <https://lincs.ed.gov/professional-development/resource-collections/profile-521>
- Staehr Fenner, D. & Kuhlman, N. (2013). *Preparing Effective Teachers of English Language Learners: Practical Applications of the Pre K-12 TESOL Professional Standards*. Alexandria, VA: TESOL Press.
- TESOL. (2003). *Standards for adult education ESL programs*. Alexandria, VA: Author.
- TESOL. (2006). *PreK-12 English Language Proficiency Standards*. Alexandria, VA: TESOL Press.
- TESOL. (2008). *Standards for ESL/EFL Teachers of Adults*. Alexandria, VA: TESOL Press.

Pricing, contracts, and business

- Booher, D. (2003). *From contact to contract*. Chicago: Dearborn.
- Lewis, L. (2000). *What to charge: Pricing strategies for freelancers and consultants*. Putnam Valley, NY: Alethia Publications.
- Literacy Information and Communication System (LINCS) <https://lincs.ed.gov/> is a professional learning space for adult educators and can provide an introduction to decision makers and potential clients as well as insights into issues in adult ESOL across the U.S.
- McQuown, J. H. (2014). *Inc. yourself: How to profit by setting up your own corporation* (11th ed.). Franklin Lakes, NJ: Career Press.
- Shenson, H.L. (1990). *The contract and fee-setting guide for consultants and professionals*. San Francisco, CA: Wiley.
- www.score.org a nonprofit association dedicated to helping small businesses get off the ground, grow and achieve their goals through education and mentorship. Provides mentoring, free business tools, and inexpensive or free business workshops and webinars.

Marketing and building a client base

- Biech, E. (2003). *Marketing your consulting services*. San Francisco: Pfeiffer.
- Crandall, R. (1998). *1001 ways to market your services even if you hate to sell*. Lincolnwood, IL: Contemporary Books.
- Crandall, R. (2003). *Marketing your services – for people who hate to sell*. New York: McGraw-Hill.
- Fields, D.A. (2017). *The irresistible consultant's guide to winning clients*. New York: Morgan James Publishing/Amazon Digital.
- Grise, E. & Grise, S. *Hey sweetpea, LLC: My own irresistible brand*. www.myownirresistiblebrand.com

Web site design

- Krug, S. (2014). *Don't make me think revisited: A common sense approach to web usability* (3rd Ed.). Berkeley, CA: New Riders Publishing.
- Plumley, G. (2015) *Teach yourself visually WordPress* (3rd ed.). Indianapolis, IN: Wiley.
- Sabin-Wilson, L. (2013). *WordPress all-in-one for dummies*. Hoboken, NJ: Wiley.
- Williams, R. & Tollet, J. (2005). *The non-designers web book* (3rd ed.). Berkeley, CA: Peachpit Press.

Surviving daily life

- Kanarek, L. (2000). *101 home office secrets* (2nd ed.). Franklin Lakes, NJ: Career Press.
- Morgenstern, J. (2004). *Organizing from the inside out: The foolproof system for organizing your home, your office, and your life* (2nd ed.). New York: Owl Books.
- <http://www.theinspiredoffice.com> Ideas for staying organized

Inspiration

- Alboher M. (2012). *The encore career handbook: How to make a living and a difference in the second half of life*. Workman Publishing Co.
- Peters, T. (2000). *The brand you 50: Fifty ways to transform yourself from an "employee" into a brand that shouts distinction, commitment, and passion*. New York: Knopf.
- Peters, T. (2003). *Re-imagine: Business excellence in a disruptive age*. London: Dorling Kindersley.

Business Questions for Independent Consultants

- How will you obtain new clients? How can you best make use of your existing contacts and network to generate business?
- How will you charge for your services? Daily? Hourly? Weekly? A flat rate?
- Will your rates be fixed, or will you adjust them depending on circumstances?
- How will you distinguish between your professional fees and reimbursable costs such as travel?
- Will you require clients to sign a contract for your services? What will you include?
- If you currently have a regularly paying job, how will you avoid conflicts of interest with your current employer?
- If you are just starting out, how will you support yourself while waiting for your consulting business to generate income?
- How will you pay for computer and technology support? Conference travel? Health insurance?
- For U.S.-based consultants, do you know how to file an IRS Schedule C form? If not, do you have a tax professional or accountant you can turn to?

Tips for Independent Consultants

- If you give workshops, create a basic template or menu for your typical offerings to make pricing and customizing easier. This can help clients identify what would serve them best and request specific support they need.
- Invest in a professional Survey Monkey account so that you can easily develop branded needs assessments and gather information to serve the client better.
- Network with consulting colleagues, whose specialities are the *same* as yours, so that you can recommend them when you are not available.
- Network with consulting colleagues whose specialities are in areas *other* than your own, so that you can recommend them when the job is right for them and not you.
- Respond to potential client and current client emails as quickly as possible but be prepared for the clients to be less responsive. Follow up with a no-harm/no-foul attitude.
- If you are based in the U.S., your clients should report your payment to the Internal Revenue Service. If that payment includes any of your expenses be sure to deduct them from your income on the appropriate tax forms.
- Engage in projects that you enjoy.
- Be prepared to say no or walk away if a project or client is not right for you. Trust your instincts in this matter.
- Identify what you are good at and what you have to share. Make the most of those skills and talents. You are the only you !
- Have a dedicated work space, whether in your home or in a shared space.
- Use volunteer and pro bono opportunities to expand your skill set and your contact list.
- If working on your own from home, try to talk with at least one person every day who is not a client nor a friend/family member.
- Make time regularly to keep up with recent developments in your field.
- For large projects, segment your proposal into two phases: needs assessment and implementation. You can't really plan what you're going to implement until you know the results of the needs assessment. If it is a major needs assessment, be sure that the client agrees to also use your services for the implementation.
- When it becomes sustainable, consider a business model that preserves your time for what you do best—and which others can't do. Then employ others for such tasks as administrative assistance, research, travel planning, accounting, and legal counsel.
- Don't be afraid to ask to be paid an appropriate fee for your services. You're worth it! But be flexible in case you need to modify your proposed services or fees in order to get the gig.
- Develop a good paper and/or electronic filing system to help you track clients, expenses, and the materials that you develop. You may be able to repurpose those materials on other occasions.

**Best Practices
Process Standards for Workplace Language Training**

A. Foundation Business Development

1. Develop a strategic (business) plan.
2. Conduct effective marketing.

B. Initial Planning with a Given Client

3. Develop a first proposal and negotiate a contract – for needs assessment.
(Build in a commitment for the second proposal, # 6.)
4. Assess the client organization’s need.
(Conduct an organizational needs assessment, or ONA.)
5. Conduct an instructional needs assessment (INA).
6. Develop a second proposal and negotiate a contract – for program development and implementation.

C. Pre-Program Administrative Matters

7. Determine an appropriate program design.
8. Identify and arrange program administration and staffing.

D. Direct Training-Related Activities

9. Create an instructional design / curriculum (primarily from INA data).
10. Select and develop appropriate training materials.
11. Deliver training.

E. Concurrent and Post-Program Administrative Matters

12. Evaluate Course(s) and Program, and Apply Recommendations

Developed by the TESOL Workplace Standards Task Force: Joan E. Friedenber, Anne E. Lomperis, William M. Martin, Margaret van Naerssen, Kay Westerfield, authors of the book, *Effective practices in workplace language training: Guidelines for providers of workplace english language training services* published by TESOL in 2003. Available from TESOL as an ebook.

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**Many thanks to our presenters.
 Here's how to contact them.**

<p>Joe McVeigh Author & Consultant joe@joemcveigh.org www.joemcveigh.org LinkedIn: joemcveigh</p>	<p><u>LEVELS</u> adult, IEP, university</p> <p><u>SERVICES</u> professional development, intercultural training, curriculum development; accreditation consulting, program reviews, conference talks, writing, editing</p> <p><u>EXAMPLE CLIENTS</u> General Electric U. S. Department of State University of Denver</p>
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<p>Anne Lomperis Chief Solution Partner, Language Training Designs lomperis@comcast.net LinkedIn: annelomperis</p>	<p><u>LEVELS</u> International organizations, government ministries, corporations, aid agencies</p> <p><u>SERVICES</u> workforce English planning, advocacy, and economic alignment; needs assessment; program, curricular, test design; training; speaking; ROI</p> <p><u>EXAMPLE CLIENTS</u> Kingdom of Saudi Arabia, ExxonMobil, Microsoft, World Bank</p>
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<p>Bruce Rindler Lecturer, Boston University brindler@bu.edu LinkedIn: brucerindler</p>	<p><u>LEVELS</u> adult, IEP, university</p> <p><u>SERVICES</u> needs assessment, curriculum development, accreditation consulting, program design, intercultural training, strategic planning, faculty evaluation and training</p> <p><u>EXAMPLE CLIENTS</u> Drexel Univ., Harvest English Inst., Mass International Academy, Portland State Univ.</p>
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<p>Jayne Adelson-Goldstein Teacher Educator-Author-Curriculum Consultant Lighthearted Learning lightheartedlearning@gmail.com www.lightheartedlearning.com</p>	<p><u>LEVELS</u> Adult</p> <p><u>SERVICES</u> professional development, curriculum development & standards alignment, conference talks, writing, editing</p> <p><u>EXAMPLE CLIENTS</u></p> <ul style="list-style-type: none"> • Portland Adult Education (Maine) • American Institutes for Research, (Washington, D.C.) • California Adult Literacy Project (CALPRO)
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<p>Deborah Kennedy Principal and Owner, Key Words deborah.r.kennedy@verizon.net www.key-words.us LinkedIn: deborahrkennedy</p>	<p><u>LEVELS</u> adult, business, EOP, governmental</p> <p><u>SERVICES</u> technical assistance and subject matter expertise in ESP, ABE/ESL, and digital literacy; online course design and instruction in business writing; language teacher professional development; writing, editing, grant writing, conference presentations</p> <p><u>EXAMPLE CLIENTS</u> Center for Applied Linguistics, Manhattan Strategy Group, BoardSource, George Mason University</p>
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