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

Needs Assessment
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.

Training
Facilitating

Benchmarks and Standards
CEA. (2017). *CEA Standards for English Language Programs and Institutions.* available here: http://cea-accredit.org/about-cea/standards

Pricing, contracts, and business
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.
*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
Grise, E. & Grise, S. Hey sweetpea, LLC: My own irresistible brand. www.myownirresistiblebrand.com

Web site design

Surviving daily life
http://www.theinspiredoffice.com Ideas for staying organized

Inspiration
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


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Many thanks to our presenters. Here’s how to contact them.

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**LEVELS**
adult, IEP, university

**SERVICES**
professional development, intercultural training, curriculum development; accreditation consulting, program reviews, conference talks, writing, editing

**EXAMPLE CLIENTS**
General Electric
U. S. Department of State
University of Denver

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**Anne Lomperis**
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**LEVELS**
International organizations, government ministries, corporations, aid agencies

**SERVICES**
workforce English planning, advocacy, and economic alignment; needs assessment; program, curricular, test design; training; speaking; ROI

**EXAMPLE CLIENTS**
Kingdom of Saudi Arabia,
ExxonMobil, Microsoft, World Bank

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**Bruce Rindler**
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**LEVELS**
adult, IEP, university

**SERVICES**
needs assessment, curriculum development, accreditation consulting, program design, intercultural training, strategic planning, faculty evaluation and training

**EXAMPLE CLIENTS**
Drexel Univ., Harvest English Inst., Mass International Academy, Portland State Univ.

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**Jayme Adelson-Goldstein**
Teacher Educator-Author-
Curriculum Consultant
Lighthearted Learning
lightheartedlearning@gmail.com
www.lightheartedlearning.com

**LEVELS**
Adult

**SERVICES**
professional development, curriculum development & standards alignment, conference talks, writing, editing

**EXAMPLE CLIENTS**

- Portland Adult Education (Maine)
- American Institutes for Research, (Washington, D.C.)
- California Adult Literacy Project (CALPRO)

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**LEVELS**
adult, business, EOP, governmental

**SERVICES**
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

**EXAMPLE CLIENTS**
Center for Applied Linguistics,
Manhattan Strategy Group,
BoardSource, George Mason University