

## Activities Survey

In January and in June we identified and prioritized ICBWorld ideas of interest for 2022-23. Here are the top suggestions:

### What networking ideas are of greatest interest to you?

- Opportunities to network and connect to counter isolation.
- Collaborating on joint proposals with other members.
- Identifying members' skills more readily.
- An advocacy subgroup on behalf of consultants' rights.

### Which Capacity building ops are of greatest value to you?

- Identifying best online collaboration and engagement tools and practices.
- Consulting lessons learned in 2021.
- Sharing products and strategies on benefits (retirement, health, disability, life insurance, vacation planning)
- Identifying best training tools.
- Learning about USAID and other donor/foundations access and proposal processes.



Photo Credit: Mentatdgt

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## Greetings ICBWorld Colleagues!

Are you keeping your cool despite the rising global temperatures and political intrigues at home and abroad? I hope your professional cool demeanor is readily apparent in dealing with feisty clients or exploring daunting networking or marketing opportunities. If not, ICBWorld is here to help you with all sorts of good advice – remember you can reach out anytime with your questions via our googlegroups listserv.

Thanks to all who participated in our **activities planning meeting!** It generated several spin off ideas relating to networking, both virtually and in-person, and consultant capacity-building activities. See sidebar for proposed ideas and watch for notices of upcoming events organized by inspired members.

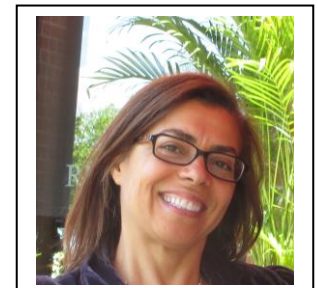
A recent informal zoom call organized by Dina Towbin and Tina Johnson focused on “**Consultant Lessons Learned in 2021**”. Checkout page 3 for information about these recurring calls and links to tips they shared, a recording of the meeting and additionally a google doc setup by Sara Roma on “virtual tools and platforms for online engagement and collaboration”.

Read on to meet our fellow member **Geoff Mazullo** on page 4. We also invite you to participate in our **upcoming events** on **research** consultancies, **health insurance/retirement planning** and an **orientation to navigating our website** for networking and other purposes (page 4).

Harambee\*,

*Marjorie Macieira*

ICBWorld Chair  
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# Consultant Resources

## Protecting Your Personal Data Online

*Photo courtesy of Cottonbro*

### QUESTION:

### HOW DO YOU SHARE OUT PRIVATE IDENTIFICATION INFORMATION AND BANKING DETAILS TO CLIENTS?

Encryption is the process of disguising the content of your messages or attachments to protect them from being read by unwanted parties. Sensitive information such as social security numbers, passports, passwords, login credentials and bank account numbers are vulnerable when sent via email. Encryption is essentially mixing up the contents of an email so it becomes a puzzle that only you or your client will have the key to solve.

Read on for how some of ICBWorld consultants protect their privacy.

*Adobe Sign for my consultants (and sometimes my clients) to sign legal documents. Most do not have a secure platform for sending banking information, just a form. I never send my SS# via email. In the rare cases where it's needed, I'll call the client and give it over the phone. I use my EIN with all my clients. My firm uses ADP for billing and payroll and it encrypts banking and SS/EIN info. So far, it's been secure. I had one client who used a billing platform and it was wonderful to be able to track my payment. I hope more firms switch to that type of system. – **Dina Towbin***

I have often been dismayed when clients (or organizations whose board I am on) expect non-secure emailing of secure documents. For contract signing, many of my clients use DocuSign, which seems to work well. For payments, my clients and I just do online banking, account-to-account. – **Karen Hoehn**

*Password-protected PDF might also be an option. – **Joe Mando***

PayPal and Bank of America for invoicing and payment. PDF Filler and Adobe for encrypted forms-- **Kathleen Marcove**

*Virtru (linked with my gmail account). – **Anne Eckman***

Paypal for overseas payments – **Paula Hollerbach**

*Password protected zipfiles and transfers directly to my business bank account. – **Marjorie Macieira***

You can also learn about encrypting emails here:

<https://www.pandasecurity.com/en/mediacenter/panda-security/how-to-encrypt-email/>



<https://icbworld.org/>



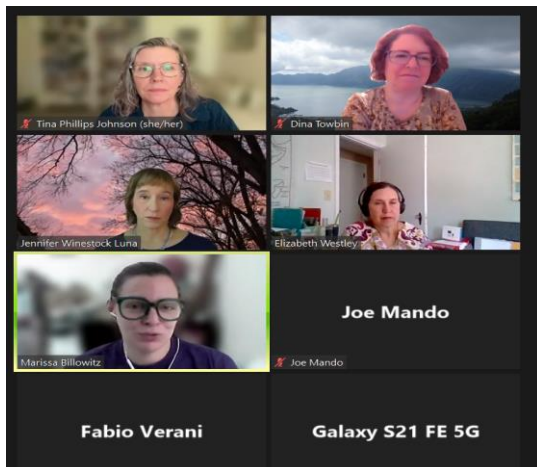
## This Month's Helpful Tips

### CONSULTING LESSONS LEARNED IN 2021

#### "ICBW Community Chat Virtual Kickoff" – Please join us!

A few non-DC-based ICBW members suggested creating space for connection in a less structured way, and organized the first of what will become (we hope!) regular events for sharing ideas and chatting. Of course, DC-based folks are welcome, too!

Our first event was held on June 28<sup>th</sup> and included participants from Mexico and the US (Boston, New York, Pittsburg and Columbus).



We discussed Lessons Learned (review the list [here](#) and feel free to add your own!), Software and Tools we like (the document is [here](#)), and the challenges of finding work.

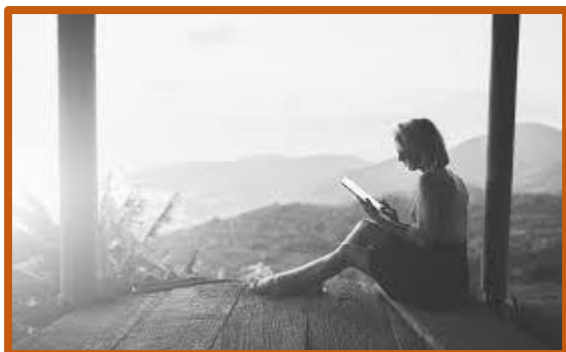
Ideas for future chats included working outside the US, health insurance, taxes, and more!

Look out for future events, and if you want to join the ad hoc organizing committee, please email [Tina Johnson](#) or [Dina Towbin](#).

#### **Link to 6/28 meeting recording:**

[https://us02web.zoom.us/rec/share/voi69bOOD5ocNF2eeWoIMURB6Pms6ZC5B\\_VSkms1dTFBzc8W1SL1c9Sgi4POeEFe.PUhqOhkPzY8-gcZS](https://us02web.zoom.us/rec/share/voi69bOOD5ocNF2eeWoIMURB6Pms6ZC5B_VSkms1dTFBzc8W1SL1c9Sgi4POeEFe.PUhqOhkPzY8-gcZS)

Access Passcode: .E7IL%%W



#### **From Membership Manager Alana Kolundzija**

Each month members should receive an automatic reminder from Memberpress of when their ICBWorld renewal is due.

I will also send out an email when your renewal month is coming up.

Renewing insures you have access to the listserv, website and it supports ICBWorld's managing expenses.

If you wish to renew at a different level than you have before, you will need to re-register as unfortunately is not possible to switch levels otherwise.

If you are uncertain of your renewal status just check your website dashboard.

For further assistance, please reach out to me at:  
[alana.kolund@gmail.com](mailto:alana.kolund@gmail.com)  
or our web guru Joe Mando at:  
[joemando2010@gmail.com](mailto:joemando2010@gmail.com)

## Upcoming Events

**September 13 at 3:30pm EDT -**

### **ICBW Conundrum Call on Freelance Research**

Discussion with brief reflections from four researchers on collaborations that proved to be nourishing as well as to deliver strong results. Also a few hot-button issues such as managing authorship, diverse teams from the global South and North, moving deadlines, and potential clients and/or co-authors taking off with your great ideas but not you. Please RSVP directly to [patti@pattipetesch.com](mailto:patti@pattipetesch.com) for a Zoom link.

**September 15 at noon EDT**

### **Konektid Presentation**

AidKonekt platform monitors USAID forecasted opportunities, enabling searches and country, sector, and competitor insight. Hear more about you can benefit.

**Health Insurance/Medicare/Finanal Planning for Retirement –Aug/Sept**

What should I be considering as an independent regarding my health and money at whatever age I am now? Let's chat with the experts!

**ICBWorld's Website Orientation (Coming again this fall)**

How do I find the right colleague consultant for co-bidding on a project? Where do I post a great article I think other members will appreciate? Where will new clients advertise work opportunities? ICBWorld's website unveiled!



## CONSULTANT OF THE MONTH: Get To Know Your Colleagues!



**Name:** Geoff Mazullo

**Residence:**  
Vermont & global nomad

**INTERESTING FACT:** I grew up in an extended, multi-generational family-26 first cousins! Family gatherings featured homemade Italian &/or Polish food, fun, laughter and story-telling.

**TYPE OF CONSULTING:** My field is environmental, social and governance (ESG) investing, primarily in emerging markets. ESG is also known as: ethical investing, green investing, responsible investment, socially responsible investment (SRI) and/or sustainable finance. I advocate, conduct research (assessments, evaluations and surveys) and design/deliver training.

**LENGTH OF TIME CONSULTING:** I worked as a corporate governance analyst then consulted for five years. That led to a 10-year engagement with East-West Management Institute (EWMI), directing several projects in Eastern Europe. Since 2010, I have been consulting again.

**CONSULTING EXPERIENCE HIGHLIGHT:** Over 20 years ago, I led a research team that launched the first surveys "Investor Relations Online" and "Reporting on Corporate Social Responsibility (CSR)" by listed companies in Eastern Europe. We conducted the surveys semi-annually for almost ten years. The surveys provided data and evidence, and also informed the design of several training programs for a range of constituencies. As a result of that initiative, I am still the Chair of the Evaluation Committee of the Nasdaq Baltic Awards, that recognize excellence in investor relations of listed companies in Estonia, Latvia and Lithuania.

**CONSULTANT STRUGGLE:** Juggling several consultancies at once is a constant struggle of planning/scheduling, and makes it difficult to exert quality control and manage expectations.

**ADVICE FOR OTHER CONSULTANTS:** Working as a consultant can be one-sided, even lonely at times. I remind myself to engage with colleagues and clients. Ask difficult questions. Request constructive criticism and feedback. It is important to share both the "thrill of victory and the agony of defeat," for those of you who remember ABC television's program The Wild World of Sports. ICBWorld has offered so many opportunities to learn, share and grow!