

# **Mentoring via the Independent Consulting TIG: Enhancing the Value of Professional Affiliations**

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Roundtable Presentation 201 to be held in Boardroom  
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Sponsored by the Independent Consulting TIG

## **Presenter(s):**

Norma Martinez-Rubin, Evaluation Focused Consulting

Becky Melzer, Evaluation Edge LLC

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## Roundtable: Mentoring via the Independent Consulting TIG: Enhancing the Value of Professional Affiliations

**Abstract:** Independent consulting offers the option of evaluation practice in various contexts: nonprofit, corporate, educational, government, and international settings. Experience and skills that distinguish self-employed independent consultants from their colleagues are assets to the field of evaluation. Mentoring transfers knowledge from a seasoned professional to a new, independent entrant to the field. This merits attention: 1) The successes and failures of independent practices can inform evaluators' professional development; 2) acquiring knowledge from an experienced evaluator decreases the learning curve to launch or grow an independent practice; and 3) mutual benefit may exist when the mentor-mentee relationship matches personal and professional interests in the AEA Guiding Principles for Evaluators, particularly with regard to practice competence and integrity. This roundtable session will highlight findings from a survey administered through the AEA Independent Consulting TIG. The survey was in response to member interest in finding a mentor to enhance learning beyond formal training programs.

## BACKGROUND

Independent consultants Norma Martinez-Rubin and Becky Melzer developed a survey on mentoring among members of the American Evaluation Association's (AEA) Independent Consulting TIG (IC TIG) in response to interest in mentoring. That interest was expressed by some members of the IC TIG during the 2008 IC TIG business meeting held in Denver, CO. Norma and Becky anticipate that findings from the online survey, administered in spring of 2009, will help inform the direction that the IC TIG can take in developing a mentoring program as an added value to its membership.

The relevance of this survey to the field of evaluation included the following underlying assumptions:

- Whether an evaluator is new to the field or greatly experienced in it, mentoring is a means to gain competence in meeting ongoing challenges in an emerging, growing, or established practice.
- Knowledge of success and failures in independent consulting practices can be transferred to new entrants to the field through a mentor-mentee relationship.
- Seasoned evaluators can benefit from exposure to new entrants' enthusiasm and eagerness to contribute to the field, interdisciplinary exchange of ideas, and recent contributions to the field.

- New entrants will have formal training in a variety of disciplines and possibly, too, evaluation-specific training, but their practice skills in consulting, evaluation, and the business of independent evaluation consulting are areas where ongoing development is a necessity.
- Mentor-mentee relationships are a means of promoting and fostering adherence to ongoing professional development and established evaluation principles.

Among the implications for evaluation practice are the opportunities, anticipated after obtaining findings from the survey, to demonstrate that independent consultants can contribute to the promotion and adherence to the AEA's Guiding Principles for Evaluators through mentoring.

The presentation of survey findings in a roundtable format at the 2009 AEA Conference provides an opportunity for exchange. We wish to share relevant survey findings and to solicit AEA membership input for future steps in planning a mentoring program for independent consultants.

## **METHODOLOGY**

In spring of 2009, we submitted a proposal to the IC TIG and AEA staff to gain approval for obtaining and surveying the IC TIG membership according to AEA guidelines. Once approval was obtained, we had two weeks to administer the survey.

In March 2009, the survey was developed and piloted with 10 colleagues who were either IC TIG non-members or later excluded from the final survey. After receiving approval, the final survey was administered using Survey Monkey Pro and included:

- an invitational email to the IC TIG email list from the evaluators and the IC TIG leadership on April 21, 2009;
- a reminder email on April 28, 2009; and
- a chance to register for a drawing for one of two \$25 Amazon gift certificates.

The survey was sent to 977 members listed on the IC TIG email list. This final count was established after removing email bounce-backs and any possible participant who had previously requested to be excluded from surveys via the Survey Monkey system. We received a total of 282 responses for a 28.9% response rate. Many analyses were conducted with a subset of the population indicating interest in being a mentor or a mentee for a total subsample size of 158. Descriptive statistics were calculated using Excel and SPSS. While the final subsample size was smaller than ideal, statistical testing revealed some notable differences. A content analysis of responses to the open-ended questions was done. Responses were coded and then discussed by the researchers for consensus.

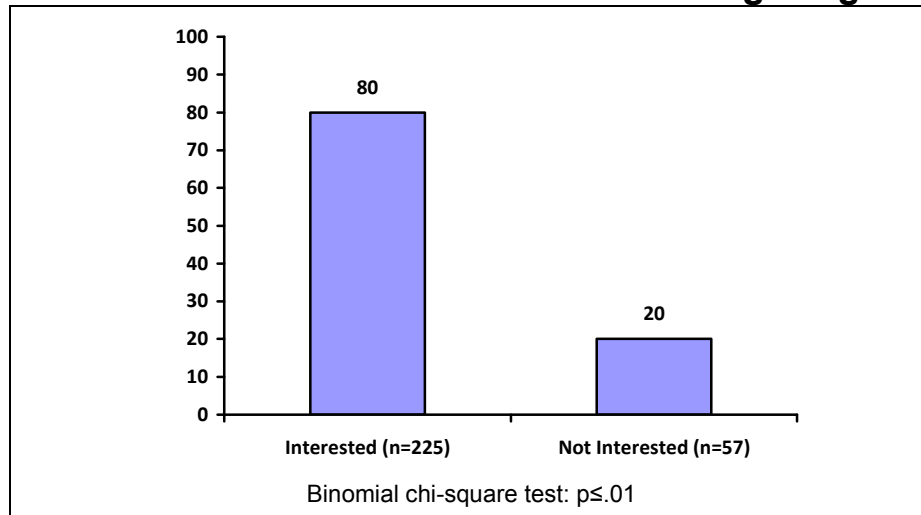
## STUDY LIMITATIONS

- There was a limited time period for response to the survey. Therefore, IC TIG members who might be interested in a mentor program might have been excluded from responding due to unavailability during the response period.
- IC TIG listserv participation varies throughout the year. IC TIG listserv members are a subset of the IC TIG membership. An online discussion of the plans to survey IC TIG members occurred in the fall prior to administering the survey. Thus, possibly the more active IC TIG members were “primed” to respond in anticipation of the survey.
- IC TIG listserv membership is not restricted to AEA members. It is possible that the more active, interested IC TIG listserv members were excluded from the survey sample.
- Respondent self-selection is inherent in a survey administered to the AEA TIG membership, during a prescribed period of time, and on a specific topic of interest.
- We did not collect the age of respondents. Therefore, we lacked data to test an age correlation with preferred types of communication methods, self-reported areas of expertise, or general topic of interest in which to be mentored.
- Concept definitions were not provided in the survey e.g., mentoring vs. coaching vs. internship. This leaves room for varied interpretations of each type of activity and related processes requiring a need to check on concurrence between prospective mentors and mentees as to the terms of a mentor/mentee arrangement.
- Survey Monkey Pro allowed for some skip patterns, but a full skip pattern structure was not possible and therefore we had some responses that were difficult to interpret or needed to be removed from the analysis because the survey developer did not change the wording of the question to accommodate for the lack of the skip pattern.
- We allowed respondents to select any combination of interest in being a mentor, mentee, and/or organizer. This complicated the analyses. We selected to not include individuals who selected both mentor *and* mentee because while this was a valid choice, we felt that at any one time a person would be acting either as a mentee or a mentor.
- “Mentee can shadow my work” was asked of both mentees and mentors and this should have been reworded to just “Mentee shadowing mentor.”

## FINDINGS

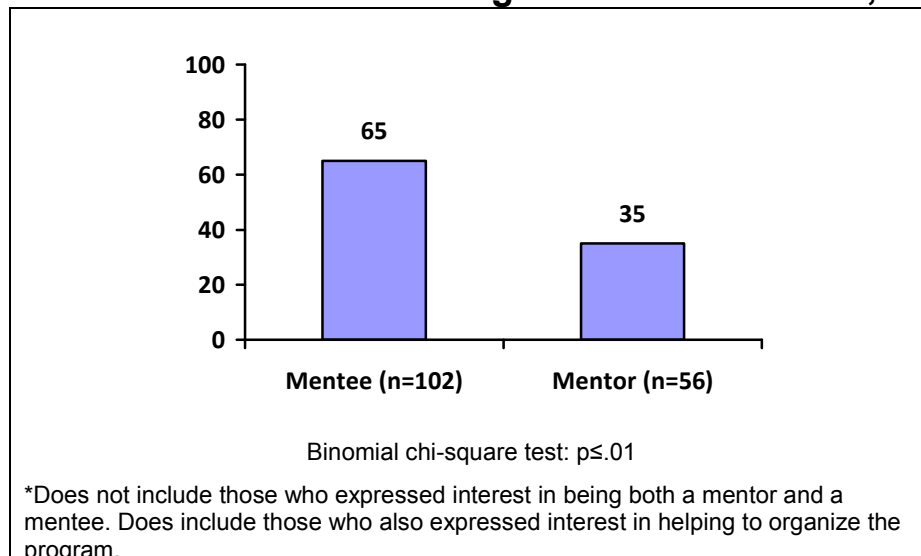
### Program Interest and Sample Demographics

#### Exhibit 1. Percent Interested in an IC TIG Mentoring Program, N=282



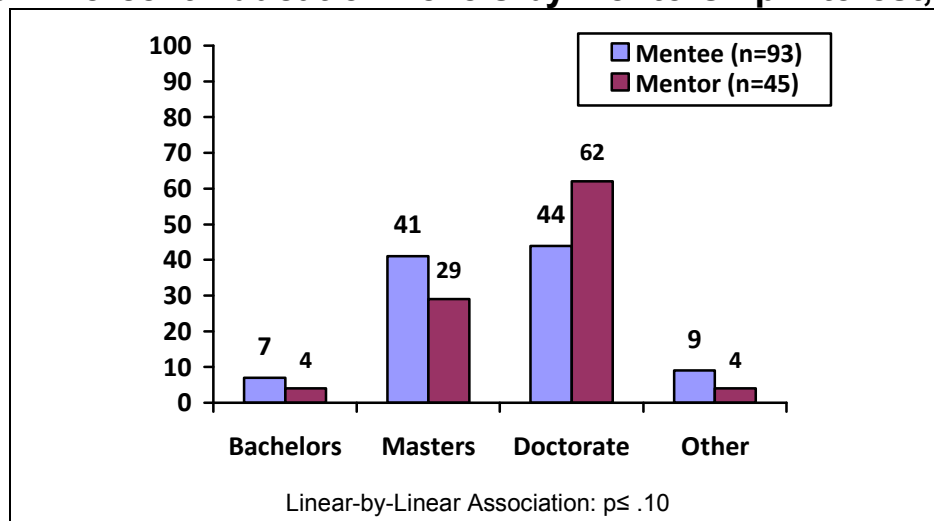
A large majority (80%) of respondents expressed interest in an IC TIG mentoring program. This included individuals who expressed interest in being a mentor only, mentee only, organizer only, or any combination of the three. Looking across all these combinations, a total of 164 (73%) expressed interest in being a mentee, 118 (52%) expressed interest as a mentor, and 67 (30%) expressed interest in being a program organizer. However, for purposes of analysis, those who expressed interest in being both a mentor *and* a mentee were excluded leaving a total sample of 158.

#### Exhibit 2. Percent Interested in Being a Mentee or Mentor, N=158\*



Among those interested in being a mentor or mentee, 65% (n=102) were interested in being a mentee and 35% (n=56) expressed interest in being a mentor.

### Exhibit 3A. Percent Education Levels by Mentorship Interest, N=138



It is interesting to note that the distribution by level of education is fairly similar across mentors and mentees and only significant at the  $p \leq .10$  level.

### Exhibit 3B. Percent and Number Reporting Evaluation Specific Education, N=138\*

	Professional Development		Doctorate		Masters		Bachelors	
	Certificate <sup>‡</sup>	Course Work	Degree**	Course Work	Degree	Course Work**	Degree	Course Work
<b>Mentor (n=56)</b>	7% (4)	25% (14)	25% (14)	29% (16)	20% (11)	18% (10)	7% (4)	16% (9)
<b>Mentee (n=102)</b>	14% (14)	34% (35)	10% (10)	33% (34)	11% (11)	34% (35)	4% (4)	18% (18)

\*Choices were not mutually exclusive.

\*\*Pearson's chi-square test for mentee/mentor difference:  $p \leq .01$

<sup>‡</sup>Includes certificate programs within degree programs.

There are very few differences amongst those seeking to be a mentor or a mentee in terms of evaluation-specific training. It should be noted that with this level of cross tabulation the sample sizes are smaller. The data do suggest a pattern of those interested in being mentors having degrees in evaluation fields more so than those with an interest in being a mentee, however, the data is only significant for those with a doctorate. Similarly, the data suggest that mentees may indicate more often having some course work in comparison with having a degree, though again it is only significant among those who have a master's degree.

In addition to education, we gathered data on the years of experience in terms of experience in the field of evaluation, membership in the AEA, and membership in the IC TIG as described below in Exhibits 4A-4C. Differences were more apparent by these measures of experience than by education levels.

### Exhibit 4A. Years in the Evaluation Field

	<b>Mentees (n=84)</b>	<b>Mentors (n=43)</b>
<b>Mean</b>	5.8	19.2
<b>Median</b>	4.0	20.0
<b>Mode</b>	3	10
<b>Range</b>	0 to 27	5 to 40

Independent samples t-test:  $p \leq .01$

Not surprisingly, those indicating that they wanted to be a mentee have fewer years experience in the field of evaluation than those seeking to be mentors (5.8 vs. 19.2 years).

### Exhibit 4B. Percent and Number for Years Membership in the AEA

	<b>Less than 1 Year</b>	<b>1 to 3 Years</b>	<b>4 to 6 Years</b>	<b>More than 6 Years</b>
<b>Mentees (n=82)</b>	28% (23)	46% (38)	20% (16)	6% (5)
<b>Mentors (n=42)</b>	5% (2)	21% (9)	21% (9)	52% (22)

Linear-by-Linear Association:  $p \leq .01$

### Exhibit 4C. Percent and Number for Years Membership in the IC TIG

	<b>Less than 1 Year</b>	<b>1 to 3 Years</b>	<b>4 to 6 Years</b>	<b>More than 6 Years</b>
<b>Mentees (n=74)</b>	42% (31)	46% (34)	12% (9)	0
<b>Mentors (n=36)</b>	11% (4)	28% (10)	22% (8)	39% (14)

Linear-by-Linear Association:  $p \leq .01$

While the distribution by education levels was fairly similar, there are significant differences in the distribution for years of membership in AEA and the IC TIG. More than half (52%) of potential mentors have been AEA members for more than 6 years where as nearly half (46%) of potential mentees have 1 to 3 years experience.

In addition, more than a quarter of mentees (28%) are new to AEA in comparison with 5% of mentors. Though fewer reported years of membership in the IC TIG, there were still significant differences found with the majority of those seeking mentors being distributed in the categories of “Less than 1 Year” and “1 to 3 Years” (88%) and well more than half of mentors distributed in the categories of “4 to 6 Years” and “More than 6 Years” (61%).



### Exhibit 5. Percent and Number by Evaluation Roles\*

	<b>Mentees (n=102)</b>	<b>Mentors (n=56)</b>
Graduate Student**	22% (22)	0
Employee in Evaluation Firm	6% (6)	2% (1)
Employee in Other Organization doing Evaluation Work (e.g. Government or Nonprofit)**	25% (25)	5% (3)
Aspiring Independent Consultant or Business Owner**	32% (33)	5% (3)
Independent Consultant or Business Owner**	44% (45)	71% (40)

\*Categories are not mutually exclusive and may be more or less than the total n for that category.

\*\*Pearson's chi-square test for evaluation role by mentoring role of interest:  $p \leq .01$

Nearly three-quarters (71%) of those interested in being a mentor are currently an IC or business owner—and they are more likely than potential mentees to be so (71% vs. 44%). However it is also interesting to note that a large percentage of potential mentees are currently ICs or Business Owners. There is more diversity in current roles for mentees. In addition, while it obvious that some potential mentors did not select any current role, several potential mentees classified themselves in more than one role.

### Communication and Mentoring Methods

#### Exhibit 6. Percent and Number by Interest in Communication Method\*

<b>Communication Method</b>	<b>Mentees (n=102)</b>	<b>Mentors (n=56)</b>
Email**	97% (99)	84% (47)
Phone	83% (85)	82% (46)
Online postings or interaction on a future IC TIG website	82% (84)	54% (30)
Off-site at an agreed upon location**	77% (78)	50% (28)
“Mentee can shadow my work”***	28% (28)	43% (24)
Online postings or interaction on a current social networking site**	74% (75)	34% (19)
On-site in my office	30% (31)	29% (16)

\*Communication Methods not mutually exclusive.

\*\*Pearson's chi-square test for mentee/mentor difference:  $p \leq .01$

\*\*\*Pearson's chi-square test for mentee/mentor difference:  $p \leq .05$

The top three communication methods by those interested in being mentees or mentors are email; phone; and online postings or interactions on a future IC TIG Website.

It is interesting to note that a similar high percentage of both those interested in being mentees or mentors are interested in phone communication in a mentoring program. At the same time, it is likely that this is considered as a complement to other communication methods. Only two (2) respondents chose “phone” but no other communication method. Similarly, no respondent chose “email” as the only response and only four (4) selected just “phone and email.”

While email and online postings through the IC TIG are of interest to both groups, potential mentees are more likely than the potential mentors to be interested in those methods. In addition, those identifying as mentees are also more interested in general online postings or interaction on a current social networking site (74% vs. 34%). (Note that information on age was not collected.)

### **Exhibit 7. Percent and Number of Mentors and Mentees Interested in Client Experience**

	<b>Mentees (n=102)</b>	<b>Mentors (n=56)</b>
Interested in providing/gaining experience working with a client on a project*	83% (85)	57% (32)

\*Pearson’s chi-square test for mentee/mentor difference:  $p \leq .01$

While more than half (57%) of those interested in being a mentor are interested in providing mentees with client experience, the percent is significantly lower than those interested in receiving this experience as mentees (83%).

When types of communication and client experience were opened up for comment several mentors responded a need to consider some methods according to project availability or that this needs to be worked out in more detail on an individual basis. Responses included:

- I’m happy to work with mentee on their client projects
- It depends on the project and if the client agrees
- There might be an opportunity for a shadow; depends on the project
- This idea is new to me and I am open to considering participation. The questions seem too cut and dry-I’d prefer to express interest and offer suggestions rather than answer yes/no

Other suggestions or preferences for communication and mentoring methods included:

- Skype calls vs. phone calls
- Only available to meet a mentee at the annual conference

Mentees' feed back focused primarily on specific mentoring needs:

- I need help with nuances of running the business
- Meet-ups at conferences or trainings
- Cc'd on project emails if it is possible
- Networking opportunities, social gatherings
- Interested in an IC TIG website as: a place to host interactive “seminar” types of activities; a forum for discussing mistakes “war stories” and other challenges; and a repository of information, examples from the literature
- Someone to go to with questions
- Tool kit for getting started as an independent consultant; other such aids for persons at varied levels of experience if there is a need

### Exhibit 8. Length of Communication\*

Communication Length	Mentees (n=102)	Mentors (n=56)
For a defined period of time to be negotiated between the mentor and mentee***	84% (86)	73% (41)
On an “as needed basis”**	82% (84)	59% (33)
For a period of time set by the IC TIG (i.e. 3 months, 6 months, 1 year, etc.)**	70% (71)	46% (26)

\*Categories for “length of communication” not mutually exclusive.

\*\*Pearson’s chi-square test for mentee/mentor difference:  $p \leq .01$

\*\*\*Pearson’s chi-square test for mentee/mentor difference:  $p \leq .10$

While many respondents chose interest in multiple methods for choosing the length of communications, in general, there was a higher percentage of both mentees and mentors that were willing to negotiate time rather than having the IC TIG set the time. Fewer potential mentors were interested with mentoring “on an as needed basis” in comparison with potential mentees (59% vs. 82%) of for a period of time set by the IC TIG (46% vs. 70%).

As with type of communication, several respondents did not select interest in only one way for determining length of a mentor communication. One mentor commented, “My response is my preferred method. I am not closed to the other options offered.” Similarly a mentee commented, “I would be fine with any of the options but prefer a timeline to be set in advance by either the mentor or via the program.”

Additional comments included:

- If for a predefined period, I would want both the mentee and/or mentor to be able to gracefully bow out of the arrangement if it is not perceived to be a good match. [Mentor]
- I'm not interested in putting time boundaries on the relationship. My needs for help may ebb & flow. [Mentee]
- It is difficult to determine a timeframe in the abstract. [Mentee]
- There could be 1-1 mentoring of a specified time but perhaps there could be regional teams of mentors that anyone could tap into when they needed to. [Mentee]

**Exhibit 9A. Percentage and Number of Self-designated Mentors Indicating the Evaluation Context/work Area in Which They Have Interest\***

**n=56**

<b>Context/Work Area**</b>	<b>Interested as a Mentor</b>	<b>Not Interested</b>
<b>Corporate</b>	20% (11)	65% (36)
<b>Nonprofits/NGOs</b>	68% (38)	18% (10)
<b>Educational</b>	55% (31)	29% (16)
<b>International</b>	25% (14)	59% (33)
<b>Government</b>	45% (25)	39% (22)

\*Categories are not mutually exclusive and may be more or less than the total n for that category.

\*\* Pearson's chi-square test for mentee/mentor difference:  $p \leq .01$

Among respondents who indicated interest in being a mentor or mentor/organizer, the largest percentage (68%) indicated the "Nonprofits/NGOs" context/work area as their area of interest. The smallest percentage (20%) of these respondents indicated interest in the "Corporate" context/area.

These respondents indicated the least interest in the corporate context/work area relative to other context/work areas. 64% of respondents indicated not being interested in the corporate evaluation context/work area.

**Exhibit 9B. Percentage and Number of Self-designated Mentees Indicating the Context/work Area in Which They Have Interest\***

**n=102**

<b>Context/Work Area**</b>	<b>Interested as a Mentee</b>	<b>Not Interested</b>
<b>Corporate</b>	40% (41)	54% (55)
<b>Nonprofits/NGOs</b>	86% (88)	6% (6)
<b>Educational</b>	78% (79)	16% (16)
<b>International</b>	50% (51)	44% (45)
<b>Government</b>	69% (70)	27% (27)

\*Categories are not mutually exclusive and may be more or less than the total n for that category.

\*\* Pearson's chi-square test for mentee/mentor difference:  $p \leq .01$

Among respondents who indicated interest in being a mentee or mentee/organizer, the largest percentage (86%) indicated a nonprofits/NGOs evaluation context/work area as their area of interest. The smallest percentage (40%) of these respondents indicated interest in the corporate context/area.

These respondents indicated the least interest in the "Corporate" context/work area relative to other context/work areas. 54% of respondents indicated not being interested in the corporate evaluation context/work area.

## Exhibit 10A. Percentage and Number of Mentors and Mentors/Organizers by Interest in a Topic Area\*

n=56

Topic Area	Interested as a Mentor	Willing to Organize	Not Interested
Difference between being an independent consultant and an employee in an evaluation firm	52% (29)	5% (3)	29% (16)
Experience with program evaluation**	75% (42)	11% (6)	5% (3)
Experience with business aspects of program evaluation	55% (31)	5% (3)	25% (14)
Incorporating the AEA Guiding Principles into an evaluation practice**	43% (24)	5% (3)	36% (20)

\*Categories are not mutually exclusive and may be more or less than the total n for that category.

\*\* Pearson's chi-square test for mentee/mentor difference:  $p \leq .01$

Among those interested in being mentors and mentors/organizers, the largest percentages indicated interest in the topic areas of “experience with program evaluation” (75%) and “experience with business aspects of program evaluation” (55%).

It is surprising that among those who indicated interest in being a mentor or mentor/organizer, 36% indicated being not interested in the topic area of “incorporating the AEA Guiding Principles into an evaluation practice.” Perhaps that is because 52% (Melzer, Exhibit 4B, Percent and Number for Years Membership in the AEA) of respondents overall, indicated having been in AEA more than six years and have had ample exposure to the AEA Guiding Principles.

## Exhibit 10B. Percentage and Number of Mentees and Mentees/Organizers by Interest in a Topic Area

n=102

Topic Area	Interested as a Mentee	Willing to Organize	Not Interested
Difference between being an independent consultant and an employee in an evaluation firm	62% (63)	10% (10)	28% (28)
Experience with program evaluation	79% (81)	19% (19)	8% (8)
Experience with business aspects of program evaluation	80% (82)	14% (14)	11% (11)
Incorporating the AEA Guiding principles into an evaluation practice	65% (66)	17% (17)	23% (23)

Here we find that among respondents indicating interest in being a mentee or mentee/organizer, the largest percentage responses by topic areas of interest are “experience with program evaluation” (79%) and “experience with business aspects of program evaluation” (80%).

A greater percentage of the mentee group than the mentor group indicated interest in “experience with business aspects of program evaluation” (80% vs. 55%). Mentees are more likely than mentors to show interest in “incorporating the AEA Guiding Principles into an evaluation practice” (65% vs. 43%). The larger percentage interest by mentees in those two topic areas might be attributed to younger age or fewer years of practice experience. Forty-six percent of mentees have been in AEA 1 – 3 years, and the mode for number of years in the evaluation field was lower (3 vs. 10), than among those who indicated interest in being a mentor (Melzer, Exhibit 4A-B: Years of Experience.)

Among the mentee group, there was a slightly greater level of interest in “willing to organize” a mentor program in any of the four topic areas posed in the survey than among the mentors. Overall, response percentages in “willing to organize” are smaller relative to the percent interested in only being either a mentee or mentor in any of the topic areas.

When we compare the percentage of responses indicating interest in a topic area to the percentage of those indicating willingness to organize a mentoring program in a specific topic area, we see a smaller number of persons “willing to organize.” We did not define what organizing entailed, but assumed that anyone indicating “willing to organize” a mentoring program for the IC TIG would avail themselves for future contact. That communication can occur as the interest in an IC TIG-sponsored program is explored further and discussed by the IC TIG leadership and members.

## **Mentors’ Perspective on a Mentor Program (n=20)**

### **Suggestions for how the IC TIG can create a successful mentoring program:**

Among those indicating interest in being a mentor or mentor/organizer, the more frequent responses were related to program structure with few other responses about program content. With regard to program structure, the more frequent responses included reference to mentor/mentee matching and having guidelines for the mentor/mentee relationship i.e., duration, communication, and expectations. Specific sample suggestions by category appear below.

#### **Program Structure**

- “I think the IC TIG should focus on helping with the match . . .”
- “. . . establish a database to successfully match mentors with mentees using standard criteria . . .”
- “Match people based on similarities of professional goals.”
- “I think the matching of mentees and mentors will be critical . . .”
- “Clear guidelines.” “. . . formulate guide-lines, text, methodologies . . .”
- “Make sure there is some sort of quality control . . .”

#### **Program Content**

- “Mentors should write a brief synopsis of experience, theoretical preferences, training, etc. and then mentees could choose based on their particular needs.”
- Create a series of short-term webinars and podcasts on topics e.g., the business of consulting, financing, bidding, sales, pricing, and contracting.

## **Mentees’ Perspective on a Mentor Program (n=23)**

### **Suggestions for how the IC TIG can create a successful mentoring program:**

Among these respondents were suggestions on program structure similar to mentors’ responses. They specifically mentioned an interest in mentor/mentee matching and guidelines for a mentoring program. Sample suggestions appear below. Mentees also mentioned program development considerations not found in mentors’ responses including some level of compensation for mentors, training for mentors, and using social networking software to remain in communication.



## Structure

- “Provide training for the mentors and have clear expectations for both mentor and mentee.”
- “Match mentors and mentees based on topical and other evaluation expertise/interests.”
- “[have] some way to match mentors with mentees on basis of interest in specific evaluation fields or approaches . . .”
- “I think that a formal program where mentee applicants are matched with a mentor from a pool of mentors for specified timeframe with general guidelines/goals for both the mentee and mentor [would create a successful mentoring program].”
- “I think some way of stratifying/classifying the mentors/experts would be helpful.”
- “Ensure that there is oversight of the mentoring relationships (check in with the mentors and mentees, independently, on a regular basis), and that training and technical assistance are offered to mentors throughout the process.”
- “Possibly some nominal compensation for mentors . . .”

## Program Development

- Build on existing relationships e.g., mentees provide a list of mentors they would like to work with
- Create a pool of interested persons
- Have built-in evaluation and quality control
- Match by experience, need, and expertise
- Stay connected through a social networking site
- Connect by similarities of professional goals
- Have clear guidelines
- Have ongoing feedback for members
- Let members know what the mentorship might look like and what the benefits might be.

## Other

- Create opportunity to meet at AEA
- “Please pay special attention to those AEA TIG members that reside outside of a metropolitan area because they have fewer opportunities to find mentors in their geographic area.”

## From the perspective of being a mentor, what might facilitate mentoring someone? (n=36)

Prospective mentors primarily cited guidance about program structure as means to facilitate mentoring someone. Some sample responses illustrate this: “Probably would be useful to have a basic set of guidelines of how the mentor might effectively advise

the mentee . . .” and “Organizing logistics, recruitment and screening in advance to maximize pairing.” Specifically, respondents cited “a structured program”, “set boundaries,” “a pre-defined project,” and “clear parameters” as program-related facilitators for mentoring someone.

Matching by area of interest, proximity, time zone, or levels of expertise were common responses. Prospective mentors also mentioned compatibility and establishing trust as important considerations.

The desired context of the mentor relationship is illustrated by the following edited responses and sample quotes which allude to an interest in some level of mentee knowledge about evaluation:

- Have a specific project (either work on a project or work to get a project)
- Set learning goals and communication expectations and “[have] common understanding of expectations.”
- “It would help if the mentee have [*sic*] some form of involvement with a program that they want to evaluate.”
- “desire to dedicate [one’s work] towards best practices”
- “The mentees ability to ask the right questions and knowledge about the field.”

Other things mentioned by respondents were “regular communication and needs assessment of mentee” and “use of communication technology such as video chat (Skype, Gchat)” as means to facilitate mentoring someone.

## **From the perspective of being a mentee, what might facilitate mentoring someone? (n =57)**

Prospective mentees offered comments that centered on obtaining practical experience and effective matching to maximize the mentoring experience. Mentees also offered specific means of communicating and some areas of content for a mentoring program. Responses included reference to mentee and mentor characteristics. Specific examples and selected quotes appear below under categories into which common responses were collapsed.

### **Communication**

- Shadowing, email, face-to-face meetings, monthly interactions
- “open communication, especially with electronic resources (i.e., email, IM, a central message board).”

### **Content**

- “Reviewing evaluation proposals, budgets, agreements/contracts, reports, etc. with mentor (written by mentor and written by mentee). Central e-archive of samples and web links to other resources (i.e., assessment tools) . . .”

- “Insight into the inner processes of being an independent consultant, such as methods for client generation, pitfalls to look out for, fee management, time management (especially if consulting part-time), etc.”
- “Having an experience (cases, assignments, projects) that is practical, relevant, applicable and enjoyable at a degree in which both my mentor and I benefit from each other, learn and grow professionally.”
- “. . . perhaps there can be guidelines created for the mentoring relationship; networking with other mentees; parity with technology available to mentor and mentee to facilitate sharing documents, etc.; low or no cost to mentee . . .”

### **Mentee characteristics**

- Clarity of needs
- Openness to suggestions
- Respect for mentor
- Learn by doing
- Having an evaluation project
- Having a small stipend
- Open communication with electronic resources

### **Mentor characteristics**

- Open
- Non-judgmental
- Experience in content area(s)
- Knowledge of resources
- Enthusiasm
- Understanding of mentee’s learning objectives
- “A mentor who is interested not only in cultivating a mentor/mentee relationship but views the development of a mentee as a synergistic business opportunity.”
- “Willingness of the mentor to engage in reciprocal learning.”

### **Analysis of Prospective Mentor/Mentee Responses**

Prospective mentees and mentors provided comments about facilitating a mentoring program through established structure, communication means, and mentor-mentee matching based on common interests and work areas. Both perspectives presented the concept of mentoring as a learning experience guided by ongoing assessment of mentee needs, openness to face-to-face and electronic communications, and compatibility.

It will be important to develop a mentoring program that addresses and supports both perspectives. A pilot period, as suggested by a few individuals indicating interest in being a mentor, would allow for integration of successful mentoring practices learned from either other AEA TIGS or professional disciplines represented by the IC TIG members who would agree to participate in a pilot phase.








Individuals interested in being a mentee seem to be eager and ready to enter into a mentoring program provided that there is clarity of needs and a mentor is open and responsive. Individuals interested in being a mentor seem a bit more cautious as they suggest having a planned program that offers guidelines, identifies pre-defined roles, and is performance-based.

## Areas of Expertise

Survey respondents were asked to self-report up to five areas of expertise by answering an open-ended item. Not everyone who responded indicated up to five areas of expertise.

Please refer to Exhibits 11A and 11B showing specific survey responses to this item. Refer to the following legend to identify the response type by category per respondents indicating interest in being a Mentor or Mentor/organizer and Mentee or Mentee/organizer.

### LEGEND

Color	Response Category
	Specific content / topic area
	Technique/method-cross-cutting context/work area
	Research
	Evaluation Approach
	Education (includes k-12, after school, higher education)
	Business-related specific topic
	Place-based Evaluation

Content analysis of responses yielded seven major categories:

**Specific content or topic** – These content areas are topics that are specific to a project or program i.e., would not necessarily be applicable to all evaluations.

This category represents the largest number of responses by both prospective mentors and mentees.

**Technique or method** – Responses in this category illustrate a technique or method that may be applicable across evaluation contexts or settings; these would ordinarily be regarded as part of the “tools of the trade” that an evaluator would want to master in order to perform the tasks imbedded in evaluation work.

Prospective mentors and mentees responded with a vast range of self-reported expertise in evaluation techniques and methods.

**Research** – Responses in this category refer specifically to a research expertise or research orientation rather than broader applications to evaluation.

**Evaluation Approach** - This category includes responses that refer specifically to an established evaluation approach (e.g., process or outcome, participatory) or specific evaluation context (e.g., education, health, multi-site, environmental programs, advocacy) for which particular techniques may exist and for which experience is gained over time.

Evaluation approaches included participatory, empowerment, utilization-focused, among others. There was a wide range of application contexts. A capacity-building approach was a recurrent response.

**Education** – Responses in this category include all those fitting an academic setting and/or educational evaluation context (includes k-12, after school, and higher education).

**Business** – This category includes responses indicating an expertise in business-specific topics or approaches and techniques applicable to the business of consulting.

The fewest number of responses of self-reported areas of expertise by either prospective mentor or mentee were in the business category.

**Place-based Evaluation** – Responses in this category were related to a type of location or setting for an evaluation where an evaluation approach or evaluation techniques used might vary as required by specific projects or programs in a given setting.

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**Exhibit 11A: Areas of Expertise – Responses by Prospective Mentors (n=42)**

Stakeholder Surveys and Interviews	Human Services Evaluation	Needs Assessments	Community Assessments	Capacity Building
Aging surveys design, including on-line surveys	Youth programs	Mental health	youth development through non-profits	
Postsecondary education evaluation	theory of change/logic models	higher education		sole proprietorship
Research/Evaluation Design	Health systems, services and program evaluation	Research funding evaluation	Social service program evaluation	
<b>Project management</b>	Measurement	Evaluation within school settings		
Performance measurement systems	<b>UFE</b>	qualitative data collection and analysis	non-profit and government evaluations / assessments	<b>proposal writing</b>
positive youth development	Logic model development education	healthcare	volunteerism	substance abuse prevention
Mixed methods	Longitudinal analysis	Data collection management	Evaluation technology resources	
<b>The business of consulting</b>	working with not-for-profits	Violence prevention & Juvenile Justice		
ATOD prevention programs	ATOD treatment program	Inclusive supports for people with disabilities	Partnerships and Coalitions	Mental Health
Workforce development/vocational rehabilitation	Housing and support services	health	Adult literacy	Youth services & supports
youth development	human services		early childhood education	k-12 education
Evaluating HIV Prevention Programs	Qualitative Analysis	Quantitative Analysis	Survey Design/Development	Report Development
Overall design	<b>Negotiating/managing contracts</b>	Working as part of evaluation team		
international development	international NGO M&E	networks of evaluation professionals		
program planning and evaluation	policies and systems	e-survey evaluations	public agency evaluations	<b>nonprofit agency evaluations</b>
program implementation	health assessments	teacher certification/national board work	qualitative foster care research	
energy program evaluation	educational settings preK-12			
environmental program evaluation	environmental program evaluation			
Early Childhood Educational Programs	College Tech Prep Programs	Evaluating educational professional development	Needs Assessments	Strategic Planning
Organizational evaluation and learning	<b>Training impact evaluation</b>	Organizational development	Management and leadership training	Executive coaching

homelessness	HIV prevention qualitative methods—interviewing/focus groups/journaling	Post incarceration programs Conflict management and negotiations among stakeholders	smoking cessation community youth development programs and initiatives	participant observation and ethnography
Partnership evaluation approaches	Grantwriting	Economic Development	Community-based Programs	International evaluation
Substance Abuse Prevention and Treatment	Diversity initiatives in science, math & technology	Small scale local not for profits & community partnerships	Corporate level management research & evaluation (specifically in health care)	Technical Writing
Evaluating schools and working with teams of teachers & administrators	Monitoring	Natural resources and human dimensions	KAP studies	Evaluation as a business—e.g., contracting, client relations, project management
International program/project evaluation	Family and Criminal Courts	Specialized treatment courts	Public defender systems	Alternatives Dispute Resolution programs and Alternatives to Incarceration programs
Child Welfare	Special Education	K-12 Education		
Federally funded grants	Outcome measurement	Time and project management		
Coaching	process flow and mechanics	human resources		
business optimization	Quality in Evaluation	Corporate Evaluations	Incident Command and Emergency Planning Evaluation	Government (US and Caribbean)
Program Evaluation	HIV/AIDS design	children's services (gov't based) implementation	Indian child welfare analysis	higher education
tribal programs	Qualitative Methods	Logic Modeling	Developing evaluation consulting business	model
teaching	Healthcare evaluation	Organizational development & evaluation	Senior level staff evaluation & capacity building	Foundation, nonprofit, NGO evaluation
Evaluation with Non-profit community-based organizations	health disparities	cultural competence	survey design/research	
Empowerment & anticipatory program evaluation	Instrument design	Data gathering methods	Statistical analysis	Report writing
community health	Health Behaviors	Outcomes Evaluation	Qualitative and Quantitative Evaluation Methods	Continuous Quality Improvement Methods
Evaluation design (formative and Summative	evaluation design & implementation	client relationships	large scale evaluations	project management
Criminal Justice Evidence Based Practices	Program Theory Modeling	organizational development	strategic planning	
quantitative and qualitative methodologies; mixed methods	mentoring/coaching staff	Career Readiness Programs		
international development		Evaluation of health and education programs		
Early Childhood Education				
Accreditations				



### Exhibit 11B: Areas of Expertise – Responses by Prospective Mentees (n=70)

educational programs Alcohol, Tobacco, and Other Drugs			logic models and grant management			
process evaluation	CQI		grounded theory analysis		data management science and math educational reform (emerging expertise)	evaluating primary prevention programs (esp. violence prevention)
violence against women	multivariate statistical analyses		science education			
Data Collection	Quantitative data analysis		Technical Writing		Applied Psychology	
K-12 education	professional development					
Research Design	Statistical Analyses					
autism research	In-Home training (specific to autism programs in TX)					
nonprofit organizational evaluation	program evaluation - nonprofit		program evaluation - research		social policy evaluation	
Program Functioning	Youth Development		Church Operations		arts	
social justice/ social change	international		nonprofit		social marketing/media advocacy	
youth risk behaviors	public health prevention		education/curriculum evaluation		Operations/Start-up Operations	Capacity Building
Project & Program Management	Program Design		Training			
Management Oriented Education (K-12)	Participant Oriented Extension		Growth/Value Added Modeling			
Qualitative data collection	Program evaluation		Reporting results			
Program Evaluation	Data Analysis		Non profit Financial Management		Social Work	Social Enterprise
Gender and communication Criminal Justice/Juvenile Justice	communication for development and social change		complexity science and social change		feminist and participatory approaches to research	organizational development
Evaluation of teacher professional development programs	Outcome Evaluation		Qualitative Methods		Process Evaluation	
governance & civil society international development	Evaluation of online education programs		Evaluation of AmeriCorps programs		Evaluation of STEM education programs	Evaluation of information literacy programs
Education	International NGO's public-private partnerships Jewish Studies		Africa Jewish Education		Educational Philosophy	

after-school programs Quantitative Methods	professional development	charter schools	school-based, human services programs
Community development Museum exhibits	Placemaking Classroom observations	Community building and civic engagement Programs	Philanthropy and grantmaking
Educational program evaluation	Community research	Policy studies	Qualitative methods
Program Evaluation	Performance Measurement	Statistics	Informal and formal science education K-doctorate
Grassroots nonprofits	Report writing	Public policy	Youth development
public health program evaluation	community organizing evaluation	advocacy evaluation	Poverty/welfare
community based research	research methodology	school choice/vouchers	Feminist approaches
research/statistics	after school programs	juvenile delinquency and drug use prevention	risk and protective factors
criminology & criminal justice	Qualitative Research	<b>Formative Evaluation</b>	Performance Measurement
Case Study Research	Program Development	Support Services	Administration
Secondary Education	cross-agency service delivery	K-12 enrichment	health care delivery
early care and education	Instrument development	Management	Organizational performance
Aerosol science	getting staff cooperation to collect data	working with staff to design doable evaluation	keeping grant and staff on track
report writing	development of measureable objectives	development of rubrics	analysis of data
applied statistics	nonprofits	youth & adolescents	teen pregnancy
Logic models & outcomes Education	Nonprofit	Crime and Justice	grant writing
Impact evaluation	Randomized control trial	Government	Nonprofit
Cultural Competence	course evaluation	<b>process evaluation</b>	mixed methods
program evaluation	non-formal child and youth evaluation	training in evaluation	needs assessments
non-formal adult education evaluation	multiculturalism	Public-Private Partnerships Cultural	Latin America and the Caribbean
social development	<b>Small Business</b>	Competency/Responsiveness in Evaluation	Business development Services.
Cooperation for International Development	Research on Evaluation	Professional Development	
Assessment in Higher Education- Student Affairs	Comprehensive School Reform		
After school			

personnel									
qualitative K-12 Education program evaluation	quantitative research, excepting HLM and other higher end techniques Higher Education program evaluation	evaluation in educational contexts, e.g., curriculum, school reform, professional development	data analysis and report writing-- communicating results	measurement development					
economic development	entrepreneurship Program/Process/Product/Per formance Evaluation Interviews financial/ budget analysis	Non-profit program evaluation	Research international development (Russian speaker)	Assessment					
Evaluation Capacity Building Survey Designs qualitative research methods Marketing		community development	Business/Non-profit/NGO Evaluation Youth issues	Qualitative Research Public Health					
nonprofit program evaluation	needs assessments	qualitative research	quantitative research	focus groups					
qualitative design Qualitative methods	working with non profits Educator quality policy	evaluation as a part of organizational learning Technology use in education	STEM ed issues higher education evaluations						
health evaluation Healthcare Operations	behavior change	quantitative methods		field work					
science education international NGO program eval	math education	teacher preparation & professional development							
Qualitative analysis Qualitative methods Education	statistics Interviewing Quantitative methods Non-Profit	qualitative research	mixed methods research	validity Strategic planning for non profits					
eval of education of English language learners and parents (K-12 public school)	eval of university programs for non-traditional students (minorities re: age, race, language, etc.)	Focus Group facilitation	Creating an evaluation plan						
		Independent Consulting	On-Line Distance Learning						
		eval of out-of-school time education organization							

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## CONCLUSIONS / SURVEY IMPLICATIONS

- The survey was exploratory. Our major assumption was that there was some degree of interest in the IC TIG developing a mentoring program. We did not define what a mentoring program would be. We were provided comments and suggestions on what respondents believed would facilitate and make a program successful.
- There are significantly fewer individuals interested in mentoring vs. being mentored. This has a bearing in the matching aspect of a mentor program when one considers the traditional model of a one-to-one mentor/mentee arrangement. The pursuit of other models may be necessary before launching an IC-TIG sponsored program that will be feasible and responsive to member availability and interest.
- The relatively low percentages of responses to “willing to organize” place the planning, administrative, and management responsibilities on volunteer IC TIG members.
- The suggestions and comments offered by respondents overall, present a degree of cautionary interest in the development of a mentor program with built-in parameters: guidelines, matching, and explicit terms of communication and program monitoring.
- The large percent of mentees are independent consultants/business owners (44%). This could affect the nature of the mentee/mentor role.
- Mentor/mentee matching was a frequent suggestion for making a mentoring program successful. It was also regarded a means of facilitating mentoring from both perspectives of mentor and mentee.
- Phone and email communications would complement other communication methods for mentors and mentees. No other single communication method stands out as a definite method for communicating or building a mentorship relationship.
- While a similar percentage of both groups (about 30%) expressed interest in meeting on-site in their office, this has the potential to be problematic since it would mean both the mentee and mentor may want to meet at their respective offices. This question as well as the “mentee can shadow my work” questions are difficult to interpret because it is likely that mentees skipped this question rather than thinking about it from the perspective of shadowing a mentor.

## AREAS FOR FUTURE RESEARCH

- The data suggest (though not statistically significant) that those interested in being a mentee are more likely than those with interest in being mentors to have taken professional development course work or have obtained some kind of certificate in evaluation. *Future investigations could ask whether those seeking mentors may be continually seeking professional development activities or if there are other factors related to this (age, etc).*
- Years of experience in the evaluation field, AEA, and IC TIG seems to be a key difference between prospective mentors and mentees. *Future research could be conducted to see if new members' hope or expect mentoring benefits from their AEA or IC TIG membership and if it will have any bearing on their continued involvement in the TIG.*
- Prospective mentees are more likely than prospective mentors to select each of the work areas or select multiple areas. *Future research could investigate if mentees are seeking mentorship as a means to explore different work/context areas prior to engaging in any one of them as a practice area.*
- Key questions remain to follow up our findings and further inform the development of a mentor program:
  - Overall, what would make an IC TIG mentor program different than AEA mentoring in general?
  - What is distinctive about an evaluation context/work area from an independent consultant's perspective?
  - What specific "experience with business aspects of program evaluation" would qualify as desirable in a mentor/mentee arrangement?
  - What are some current models for planning a mentor program that might be replicated in the IC TIG?