

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

### Why is this topic important?

Findings from a survey administered to Independent Consulting TIG members 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. 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.

### What do you need to know?

Topic	Findings	Conclusions
Interest in IC TIG Mentoring Program	<ul style="list-style-type: none"> <li>80% of 282 respondents indicated an interest in an IC TIG mentoring program.</li> <li>158 indicated specific interest in being a mentee OR a mentor – 65% (102) are potential mentees and 35% (56) are potential mentors.</li> </ul>	The fact that there are fewer potential mentors is not surprising but an issue for designing and implementing a mentoring program. This will also be important in relation to the different mentee/mentor interests by context/work area or topic area (see below).
Evaluation-specific Training	<ul style="list-style-type: none"> <li>Mentors are more likely than mentees to have evaluation-specific PhDs (25% vs. 10%) and though not significant, Master's (20% vs. 11%).</li> <li>Mentees are more likely to indicate having Master's coursework (35% vs. 18%) and, though not significant, a professional development certificate (14% vs. 7%).</li> </ul>	This may be indicative of the types of routes that potential mentors have taken to their evaluation training vs. potential mentees. The coursework and certificate findings indicate that potential mentees may be more likely to seek professional development activities to complement non-evaluation specific degrees.
Evaluation Experience	<ul style="list-style-type: none"> <li>Mentors have more years experience (<math>\bar{x}</math> =19.2 years) than mentees (<math>\bar{x}</math> =5.8 years).</li> <li>73% of mentors have been in AEA for 4 or more years while 74% of mentees have been in AEA for 3 or fewer years. Similarly, 61% of mentors have been in the TIG for 4 or more years and 88% of mentees have been in the TIG for 3 years or fewer.</li> </ul>	The membership findings may reflect new members' hope or expectation of mentoring benefits from their AEA or IC TIG membership. In addition, they show that potential mentors are likely to be more experienced than potential mentees.
Evaluation Role	<ul style="list-style-type: none"> <li>Mentees are more likely to be an aspiring IC (32% vs. 5%), be an employee doing evaluation work (25% vs. 5%), and/or a grad student (22% vs. 0%). Mentors are more likely to be an IC or business owner (75% vs. 44%).</li> </ul>	It is important to recognize that there is a substantial group of potential mentees who are already ICs (44%) indicating different needs for mentoring activities for current ICs and potential ICs.

TOPIC	FINDINGS	CONCLUSIONS
Communication & Mentoring Methods	<ul style="list-style-type: none"> <li>• The top two preferred communication methods for mentees and mentors are email (97% and 84%) and phone (83% and 82%).</li> <li>• Mentees are more likely to select IC-TIG online postings (82% vs. 54%); off-site at an agreed upon location (77% vs. 50%); and online in general (74% vs. 34%). Mentors are more likely to select shadowing (43% vs. 28%). 30% of both selected on-site in an office.</li> <li>• The top “length of time” most preferred by both mentees and mentors was “for a defined period of time to be negotiated by mentor and mentee” (84% and 73%). Mentees were more likely than mentors to indicate they would be interested in the TIG setting the period of time (70% vs. 46%).</li> </ul>	<p>It is interesting to note that a similar high percentage of both mentees and mentors are interested in phone communication. 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.” It will be important to consider how setting a defined period of time will or will not attract potential mentors and how not setting a period of time could impact program effectiveness. Further research into what would be acceptable as set periods of time may be needed. The current question allowed for multiple answers and this may need more specific honing.</p>
Client Experience	<ul style="list-style-type: none"> <li>• 83% of mentees are interested in client experience in comparison to 57% of mentors. Comments from mentees include: needing help with nuances of running a biz; being cc’d on project emails, networking, having someone to go to with questions, and interest in hosted interactive seminars or tool kits for starting as an IC. Mentor comments included ideas that mentoring might be limited to one-on-one opportunities paired with other communication and client mentoring or shadowing might be possible depending on the project/client.</li> </ul>	<p>It is important to recognize the need of mentors working with their own clients and the mentees’ interests.</p>
Evaluation Context/Work Area of Interest	<ul style="list-style-type: none"> <li>• 86% of mentees and 68% of mentors indicated the “Nonprofits/NGOs” context/work area as their area of interest. These are the highest percentages among response options (corporate, nonprofit/NGO, educational, international, and government) presented.</li> </ul>	<p>Response categories were not mutually exclusive and people may or may not consider an organization’s tax status associated with work context. Nonetheless, it was striking to see that among respondents overall, would-be mentors and mentees in the IC TIG indicated the “corporate” context/work area as the area of least interest relative to other context/work areas.</p>

	<ul style="list-style-type: none"> <li>54% of mentees and 64% of mentors indicated being not interested in the “corporate” context/work area.</li> </ul>	Independent consultants interested in the corporate evaluation context might be members of other TIGS (e.g., Business & Industry)
Topic Areas of Interest	<ul style="list-style-type: none"> <li>75% of potential mentors indicated interest in the topic areas of “experience with program evaluation”; among mentees, 80% is interested in “experience with business aspects of evaluation.”</li> <li>Relative to the percentage of those indicating interest in being a mentor, a higher percentage of mentees (80% vs. 55%) are interested in the “experience with business aspects of program evaluation.”</li> <li>37.7% of mentors and 22% of mentees indicated being not interested in the topic area of “incorporating the AEA Guiding Principles into an evaluation practice.”</li> </ul>	<p>The higher percentage of mentees than mentors interested in “the experience with business aspects of evaluation” makes sense in the following context: Among those indicating interest being a mentee, 46.3% 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.</p> <p>The interest in business aspects of program evaluation leaves room for ongoing workshops or presentation sessions for new entrants to the field choosing to become independent consultants and whose practice is also a business entity.</p> <p>It will be worthwhile exploring alternative guiding principles applied by practitioners in the IC TIG.</p>

**Summary of suggestions for how the IC TIG can create a successful mentoring program:**

Would-be mentees and mentors provided comments about facilitating a mentoring program with 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 agree to participate in the pilot phase.

Individuals interested in being a mentee seem 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 — Members as Resources for an IC TIG-sponsored Mentoring Program

- Overall, prospective mentors and mentees indicated a preponderance and broad range of areas of expertise in content or topics (e.g., philanthropy and grantmaking, health-related, age-associated, organizational, community-based, professional development, art & science, project management, ethnic groups).
- Respondents indicated expertise in techniques or methods applicable across evaluation contexts or settings (e.g., assessment, qualitative and quantitative data collection methods, instrument design, data and performance management and monitoring)
- Business-related expertise (e.g., entrepreneurship, financial and budget analysis, business development and optimization, negotiating and managing contracts) is present, but relatively scanty in comparison to the above.
- Sample context-specific evaluation expertise different from the general response categories presented in the survey: incident command and emergency planning, research funding, children's services, AmeriCorps, community organizing, social policy, STEM education, and information literacy.

We thank the IC TIG leaders and survey respondents for making this presentation possible. We will heed the encouragement provided by IC TIG members:

*“Try something on a small scale to work out the bugs (evaluate it . . .) and then scale up.”* — New York, NY

*“Develop a strategy for pairing mentor-mentee based on specific criteria.”* — Jericho, VT

*“I think communication and support will be the key to success . . .”* — Fort Worth, TX

*“I think this will be very helpful and look forward to the opportunity to participate.”* — Santa Cruz, CA

### Background Information

Norma Martinez-Rubin, M.P.H., M.B.A., CHES ([norma@evaluationfocused.com](mailto:norma@evaluationfocused.com)) is a public health education practitioner turned program evaluator. She launched Evaluation Focused Consulting in 2005. She realized that already bilingual and bicultural, the notion of creating cultures of inquiry among nonprofit organizations seemed a worthwhile pursuit. This blends her interests in health research, capacity development, and program planning. For fun, she volunteers in projects to encourage civic participation. She was recently appointed Planning Commissioner in her adopted City of Pinole. Primarily oriented to using qualitative research methods and a fan of documentary photography, she looks forward to including photovoice in future evaluation projects.

Becky A. Melzer, M.A. ([becky@evaluationedge.com](mailto:becky@evaluationedge.com)) has more than 13 years experience in evaluation and applied social science research. She began IC work in 2007 and established Evaluation Edge, LLC in 2008. Her work has recently spanned a variety of program areas including women's entrepreneurship; K-12 education; and health. As a volunteer, she likes organizing political and environmental projects. In addition, she enjoys planning her & her husband's 10<sup>th</sup> anniversary trip, playing X-Box, and is quite fond of watching BBC Jane Austen productions. Her current dream is to do an evaluation related to or requiring extensive research on traveling, playing video games, or watching British television/films.