

# SOUTHEAST EVALUATION ASSOCIATION NEWSLETTER

## SEA

MAY 2012

### SEA's 2012 Program Calendar is Here!

SEA's Program Committee

For professional evaluators, learning doesn't stop with graduation. Methods and techniques change rapidly and new problems emerge. To help us keep current, SEA is hosting the following events in 2012.

- **Evaluating the Yardstick: A Practical Guide to Assessing the Adequacy of Measurement Instruments** (May 7th Webinar)
- **Managing for Results** (May 30th Webinar)
- **Survey Refresher for Old Pros** (June Program)
- **Hosting Successful Webinars and Remote Meetings** (August Webinar)
- **Criminal Justice, Education, and Health & Human Services Professional Roundtables** (September Program)

Please check [SEA's Website](#) for Updated Dates, Times, and Locations for 2012 SEA Programs



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### Amended SEA Bylaws Improve Membership Status!

Bernadette Howard



At the SEA Board's monthly meeting on Tuesday, May 1st, Board members discussed the long-standing tradition of SEA membership occurring in the calendar year. Presently, In Article III, Section 3, "Membership Year," SEA's bylaws state that "the membership year of the Association shall be from January 1 to December 31." The board recognized that our members join throughout the year, often when programs are offered. Therefore, the board approved the following amendment to Section 3: "The membership year of the Association shall be 12 months from payment of membership

dues." This new policy is effective immediately for all 2012 members. For example, if a member paid the annual dues in March, 2012, their SEA membership will expire in March, 2013. The SEA Coordinator will send personal reminder emails to each member when it is time to renew. If you have any questions about this new policy, please do not hesitate to email the [SEA Coordinator](#). We thank all of our members for their continued support of our association!

## Who Knew? Learning More About Each Other

by Carrie Blanchard, Ph.D.  
SEA President-Elect and Annual Workshop Chair



The Florida Chamber Foundation is the not-for-profit solutions arm of the Florida Chamber of Commerce that provides data and analysis related to the Six Pillars of Florida's Future Economy™. The Six Pillars framework comprehensively approaches economic development to encompass a broad perspective, including Talent Supply & Education, Innovation & Economic Development, Infrastructure & Growth Leadership, Business Climate & Competitiveness, Civic & Governance Systems, and Quality of Life & Quality Places. The Six Pillars framework serves as an organizing force for strategic planning at the local, regional and state levels. Its real power lies in the efficiency of harnessing fragmented viewpoints into a common and consistent conversation. The Florida Chamber Foundation, along with its Six Pillars Caucus System™, released the first iteration of the Six Pillars 20-year strategic plan to accomplish the vision set forth above.

Even as you read this, community leaders from Jackson, Columbia, Palm Beach, Marion, Broward, Collier and Lee counties—as well as regional efforts, such as the Central Florida Partnership's [myregion.org](http://myregion.org)—are using the framework to guide their local dialogue. And the list of adopting partners is growing. The resulting priorities will differ, but the

parameters and focus of the discussion is aligned through the common language and framework of the Six Pillars.

The Florida Chamber Foundation has an objective to develop a state-wide, 20-year plan. While the framework offers a powerful tool for strategic planning at all levels, the 20-year plan requires a commitment to evaluating our current status and progress toward stated goals through measurement. To answer that call, the Foundation developed The Florida Scorecard, a dynamic online tool that identifies and tracks metrics, indicating Florida's status, within each of the Six Pillars. You can view the current version of this tool at [www.TheFloridaScorecard.com](http://www.TheFloridaScorecard.com).

Some important indicators of progress include affordability of higher education, the rate of business formations, air quality, public transit use, litigation, permitting, emergency preparedness, crime rate, uninsured residents and low-birth-weight newborns, to name just a few. The intent is to expand The Florida Scorecard to provide regional views of performance so that local stakeholders can measure and evaluate their position respective to each other, the state and communities across the globe.

Formed in 1986, the Southeast Evaluation Association (SEA) fosters and promotes program evaluation by providing opportunities to exchange information and ideas related to evaluation. Our members have varied backgrounds in program evaluation, teaching, policy analysis, and performance measurement. However, we all share an interest in finding out whether programs work and how to improve them. ***"Who Knew? Learning More About Each Other"*** is a new column in SEA's newsletter in which we strive to learn more about each other and the sectors we work in: state government, local government, universities, and the private sector (both for profit and not-for-profit). If you would like to submit an article about the work you do, please contact [Sean Little](#), Editor.

## The President's Message

by Fred Seamon, Ph.D.

It is an honor and privilege to follow in the footsteps of past SEA Presidents who have provided strong leadership to SEA. While serving as SEA's President for 2012, I hope to build on our previous successes. Spring is the time for re-birth, regeneration, and new growth and is the backdrop for my message to you as President.

SEA both benefits and serves as a resource for evaluation end-users, practitioners, and consumers. We are in an environment where different audiences are asking the "so what" questions, the "what difference: questions and the "what is the impact" questions in a number of ways for a variety of reasons. As public officials continue to struggle to balance revenues against expenditures, the demand and need to answer these questions will grow louder.

My goals for the year are to expand SEA's reach and impact by growing membership, continue to offer high quality professional

development opportunities that attract diverse audiences, and position SEA to experience significant growth. In fact we anticipate phenomenal growth this year and beyond. Throughout the year we plan to provide an attractive menu of offerings that attract evaluation end-users, practitioners, and consumers. We want to continue to provide opportunities for those who regularly attend SEA programs and those of you who could not attend last year. We feel strongly that membership in SEA gives you access to high quality and affordable, evaluation resources and expertise. When budgets are tight and professional development is critical you can turn to SEA to meet your needs.

Reaching the above goals will be made possible by an outstanding and supportive SEA Board. I want personally thank each of our Board members - Dr. Carrie Blanchard, Ms. Kelly Kilker, Dr. Barbara Gill, Ms. Jennifer Johnson, Ms. Kathy McGuire, Dr. Steve Lize, Dr. Kellie



Photograph courtesy of  
Dr. Fred Seamon

O'Dare, Ms Sheena Horton, Dr. Linda Smith, Dr. Darlene Heinrich, and Dr. Linda Schrader for their commitment and willingness to serve. A special thanks is extended to Ms. Bernadette Howard, our SEA Coordinator, who is SEA's "glue" in a number of ways.

To our members and to those who will become members we invite you to join us in what will be a very exciting and productive year for SEA !

Regards,  
Fred Seamon  
fseamon@mgtamer.com  
(850) 386-3191

## The Objectives of SEA

According to SEA's Bylaws, the objectives of SEA are:

- To promote improvement and accountability at all levels of policy and programs.
- To encourage, stimulate, and provide training for evaluation personnel.
- To foster and promote program evaluations by providing opportunities to exchange information and ideas relating to evaluation.
- To promote the development of theory and the acquisition of knowledge on which to base professional program evaluations.
- To promote the use of standards in the evaluation profession.

## Meet Your 2012 SEA Board Members!



Photograph courtesy of  
Dr. Fred Seamon

**Fred Seamon, Ph.D.**  
**SEA President**

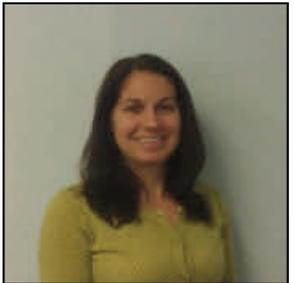
Dr. Fred Seamon is a Senior Partner with MGT of America, Inc. He is very familiar with the higher education environment, having been involved in virtually all of MGT's projects with Historically Black Colleges and Universities (HBCUs). For over 12 years, he was a full-time faculty member at Florida State University and served an adjunct professor at Florida A&M University for over 10 years. While at Florida State University, he chaired accreditation site teams for the Council on Social Work Education including accreditation site visits to HBCUs. He has served on the SEA Board since 2006.



Photograph courtesy of  
Dr. Carrie Blanchard

**Carrie Blanchard, Ph.D.**  
**SEA President-Elect and Conference Chair**

Dr. Carrie Blanchard serves as the Director of Research and Public Policy at the Florida Chamber of Commerce Foundation. She provides data driven analysis on trends and issues impacting Florida's economy and performs policy research surrounding the Six Pillar framework. Prior to joining the Foundation team, Dr. Blanchard served in the Mayor's Office for the City of Tallahassee managing local, state, and federal policy issues and appropriations. Her educational background includes a Ph.D. in Public Administration and Policy from Florida State University, a Masters in Public Administration from the University of Miami, and a Bachelors in Business. She has served on the SEA Board since 2011.



Photograph courtesy of  
Kelly Kilker

**Kelly Kilker**  
**Secretary**

Kelly Kilker is a Management Review Specialist with the Office of the Inspector General at the Florida Department of Education (DOE). In this position, she conducts internal audits, management reviews, and consulting projects for the various programs within DOE. Kelly is a graduate of Florida State University and has been a public sector employee since 2004, having the privilege to work for several state agencies. This is her first year on the SEA Board.



Photograph courtesy of  
Dr. Barbara Gill

**Barbara Gill, Ph.D.**  
**Treasurer**

Dr. Barbara Gill is the Director of Educational Research at Tallahassee Community College (TCC). In that role, she assists instructional and non-instructional divisions of the College in assessing and evaluating their programs and services. She is a member of the College's Institutional Effectiveness and Planning Committee, and she serves as TCC's accreditation liaison to the Southern Association of Colleges and Schools. Prior to joining TCC, she was a Research Associate at the Learning Systems Institute at Florida State University. She holds a Master's Degree from the University of Minnesota and a Ph.D. from Florida State University. She has served on the SEA Board since 2009.

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## Meet Your 2012 SEA Board Members!

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**Jennifer Johnson**  
**SEA Past-President**

Jennifer Johnson is a Staff Director with the Florida Legislature's Office of Program Policy Analysis and Government Accountability (OPPAGA). Since 1999, she has conducted and led evaluations and policy analyses in health and human services. In particular, Jennifer has evaluated policy issues related to both Florida's Medicaid program and public health system. In addition, she assists with the publication of OPPAGA's electronic newsletter, "The Florida Monitor Weekly". She has served on the SEA Board since 2009.

Photograph courtesy of  
Jennifer Johnson



**Kathy McGuire**  
**SEA Past President and Program Co-Chair**

Kathy McGuire serves as Deputy Coordinator of the Florida Legislature's Office of Program Policy Analysis and Government Accountability (OPPAGA). For more than 20 years she has conducted and supervised a wide variety of program evaluations and policy analyses. She also has attended the Legislative Staff Management Institute at the University of Southern California. She has served on the SEA Board since 2006.

Photograph courtesy of  
Kathy McGuire



**Steve Lize, Ph.D.**  
**SEA Program Co-Chair**

Dr. Steve Lize is an independent consultant based in Columbia, South Carolina. He is working with state governments to provide technical assistance in cost-benefit analysis of criminal justice programs. Prior to that he served as a Senior Legislative Analyst with the Florida Legislature's Office of Program Policy Analysis and Government Accountability (OPPAGA). He earned a PhD in Sociology and a MA in International Service from Roehampton University London. He has served on the SEA Board since 2010.

Photograph courtesy of  
Dr. Steve Lize



**Kellie O'Dare, Ph.D.**  
**SEA Program Co-Chair**

Dr. Kellie O'Dare is a Senior Legislative Analyst with the Office for Program Policy Analysis and Government Accountability (OPPAGA), where she conducts research, policy analysis, and program evaluations primarily in the fields of health and human services. Her areas of interest also include quantitative methods, measurement and statistics, obesogenic environments, the sociopolitical economy of food, and health and wellness. Dr. O'Dare has served as a professor at Florida State University and Thomas University. She holds a Ph.D. and Master's Degrees in Social Work, a Master's Degree in Public Administration, and a Bachelor of Science in Education. This is her first year on the Board.

Photograph courtesy of  
Dr. Kellie O'Dare

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## Meet Your 2021 SEA Board Members!

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Photograph courtesy of  
Sheena Horton

### **Sheena Horton** **SEA Program Private (For Profit) Sector Representative**

Sheena Horton is a Research Associate for the Higher Education Division with MGT of America, Inc. She has experience in program evaluation, needs assessments, program management and organizational reviews, classification and compensation studies, consolidation studies (program realignment), and survey design and administration. Her past evaluation work includes PK-12 school districts and programs (including Safe Schools Healthy Students and the National Youth Gang Survey), child abuse and domestic violence prevention/intervention programs, local level criminal record analyses, and independent reviews of youth violence prevention initiatives. This is her first year on the SEA Board.



Photograph courtesy of  
Dr. Linda J. Smith

### **Linda J. Smith, Ph.D.** **University Sector Representative**

Dr. Linda J. Smith is currently an adjunct professor teaching graduate courses at Florida State University and University of Maryland University College. Her course subjects include program evaluation, qualitative research methods and analysis, and instructional design for distance learning. She also is the Coordinator of Online Professional Development Courses for the American Association of Collegiate Registrars and Admissions Officers. Linda returned to academe after a civil service career with the Social Security Administration where she worked as a senior staff project director in quality assurance and program evaluation. She has served on the SEA Board since 2011.



Photograph courtesy of  
Dr. Darlene Heinrich

### **Darlene Heinrich, Ph.D.** **State Sector Representative**

Dr. Darlene Heinrich is currently Lead Evaluator with Planning and Evaluation Unit of the Florida Department of Elder Affairs. In addition, she participates in the Performance Outcomes Measures Project of the Administration on Aging (AoA) which helps other State Units and Area Agencies on Aging assess their own program performance. She has served on faculties of several colleges and universities including Florida State. Dr. Heinrich holds a Master's Degree in Educational Research from Bucknell University and a Ph.D. from Florida State University in Educational Psychology. She has served on the SEA Board since 2011.



Photograph courtesy of  
Dr. Linda Schrader

### **Linda Schrader, Ph.D.** **American Evaluation Association Liaison**

Dr. Linda Schrader directs the graduate education program in program evaluation at Florida State University. She has twenty years experience in directing and conducting research and evaluation studies for state and federal education and human service organizations throughout the United States. In particular, her work has focused on developing evaluation strategies for agencies serving individuals with disabilities. She served as the Lead Evaluator in federal lawsuits designed to remedy deficiencies in the quality of services provided to individuals with developmental disabilities in Texas and Tennessee. Previously, she worked for the Florida Legislature in the development of model technology schools. She has been involved with SEA from the beginning!

## Surfing the Web with Sheena Horton



*Evaluators do research for a living, yet the world wide web can be an overwhelming place to start. SEA Board Member Sheena Horton has graciously volunteered to review websites that provide information useful to evaluators in what has become a recurring column in the SEA Newsletters. Let the reviews begin!*

### **Prezi: The Zooming Presentation Editor**

<http://prezi.com/>

This website provides an alternative to using PowerPoint slides for presentations. The zoomable canvas makes it fun to explore ideas and the connections between them. The result: visually captivating presentations that lead your audience down a path of discovery. The cloud-based software is easy to use and allows multiple users to collaborate on a presentation at the same time. To view samples of Prezi presentations, visit <http://prezi.com/explore/>.

### **Join.Me**

<https://join.me/>

This website offers users a domain for hosting free online meetings with screen sharing capabilities. The free version of Join.Me allows up to 250 viewers and lets users share files. Join.Me is a great resource for pulling together last minute meetings or meetings with people across distances.

### **Zotero**

<http://www.zotero.org/>

This website provides a powerful, easy-to-use research tool that helps you gather, organize, and analyze sources and then share the results of your research. The software is also able to automatically store and format citations for articles and books you are reading online. Zotero is a powerful research tool to use while writing a thesis, dissertation, or journal article.

### **Yammer: The Enterprise Social Network**

<https://www.yammer.com/>

This website provides a free and private social network for you and your colleagues for networking and exchanging information and ideas. Yammer also offers a space for people within a company who may work at different locations or who may never otherwise meet to share their expertise and experience with each other. The website also allows users to share and store files online and to collaborate on projects.

## Book Review:

### Barrington, G.V. (2011) *Consulting Start-Up and Management: A Guide for Evaluators and Applied Researchers*

Reviewed by Sean Little

While the education of evaluators rightly focuses more on evaluation skills than on business skills, the resulting lack of business skills presents evaluation consultants with a major problem. Barrington wrote this book to address this skill deficit and largely succeeds, within the confines of a 294 page introductory text. As this anorexic recovery has pushed some of us, ready or not, into consulting, this book should find a ready audience.

Other evaluators could certainly benefit from this book, despite its focus on consultants. Many people would readily admit to problems with time management. Although critical for knowledge workers, most of us have not formally studied knowledge management, but an unknown number feel that we should. Barrington devotes a chapter to each of these two management areas. People looking to get hired in consulting firms can "reverse read" the parts on hiring staff to learn what consultants look for in potential employees.

Barrington discusses many complex business issues and provides tools for managing them, but only a few can be discussed in the available space: the recovery rate, time management, client contact summary forms, and knowledge management.

#### The Recovery Rate

The recovery rate, arguably, forms the single most important business metric for consultants to understand. This rate measures the ratio of billable time to the sum of billable and non-billable time in a given time period. Billable time refers to time spent in activities that can be charged to a specific client and linked to a contracted budget category; non-billable time refers to time spent in work activities that cannot be charged

to a contracted budget category, such as marketing services, writing proposals, and managing accounts. Barrington divides billable time into standardized categories and non-billable time into standardized categories and sub-categories. Billable time generates income; non-billable time does not. Increasing the recovery rate drives financial success in consulting.

#### Time Management

Barrington's time management system has five major functions: 1) to document amount of time spent on particular activities, 2) to calculate the recovery rate, 3) to identify those activities that absorb too much time, 4) to identify those activities that need more time, and 5) to improve one's ability to develop budgets by comparing estimated time to actual expended time. As this system has great flexibility, non-consultants could easily adapt it to their needs.

Four instruments comprise Barrington's Time Management System: 1) *Daybooks*, 2) *Semi-Monthly Timesheets*, 3) *Semi-monthly Summary Timesheets*, and 4) *Comparison of Estimated and Actual Time Sheets*. The forms in the book can be easily created and modified in Excel.

Throughout this book, Barrington emphasizes the importance of using standardized forms, filing systems, categories and sub-categories. Consultants have to come into a situation cold, do their work, and get out. The less time spent developing non-billable instruments or processes, the greater the recovery rate will be. The less time spent in developing billable instruments or processes the more competitive the proposal will be.

*Daybooks*. Each *Daybook* documents how time was spent on that day, with

the fifteen minute interval as the central unit of measurement. Each fifteen minute interval is linked to either a billable category or a non-billable sub-category and entered into the *Daybook*. Notes can be written on the side to provide details on how time was spent. This instrument protects the consultant if a billing dispute arises.

*Semi-Monthly Timesheets*. This timesheet summarizes the daybooks for one half of the month with separate timesheets for non-billable time, and each project's billable time. For example if a consultant works on five projects in the same half-month, that consultant will need six semi-monthly timesheets: one for non-billable time and one for each project's billed time. These instruments document monthly time charges for allowable budget categories.

*Semi-Monthly Summary Timesheets*. These instruments summarize all the timesheets for a given half month period. These summaries allow the consultant to calculate the recovery rate, and to analyze which categories had an excess or a deficit of work performed.

*Comparison of Estimated and Actual Project Time*. This instrument contrasts the estimated time (source - budget justifications for particular tasks) with the actual time (source - *Daybooks* and *Semi-Monthly Timesheets*). As a reflective practice, this comparison should improve one's ability to estimate the time a task should take. For that learning to occur, however, budget categories have to be congruent with those of the *Daybooks* and time has to be scheduled for this analysis on a regular basis.

#### Client Contact Summary Form

This form documents each client contact. Information from the meeting

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## Consulting Start-Up and Management: A Guide for Evaluators and Applied Researchers

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is stored or displayed in three areas of the form: 1) client and project identification information, 2) meeting identification information, and 3) meeting content information. This third area stores and displays the following: the purpose of the meeting, information obtained from the meeting, observations/comments, and mutually agreed upon action steps/deliverables with their due dates. This paper trail documents what happened and what changed.

### Knowledge management

Consultants are knowledge workers. For consultants, knowledge represents the infrastructure and the inventory. Unlike the machines, supplies, and products, of manufacturing, knowledge exists on paper, in cyberspace, and in the neural patterns and pathways of the consultants and their staff. If consultants do not organize knowledge systematically, it will disappear or degrade. Non-retrievable stored knowledge lacks both utility and value. The retrieval of knowledge provides storage with its utility.

While many of us have heard the term “knowledge management”, fewer of us have a clear idea what it is or how it relates to our work. Barrington provides a much needed clarification of this “fuzzy” buzzword. She divides knowledge management into four categories: knowledge generation, knowledge capture, knowledge retrieval and knowledge translation.

Knowledge generation refers to the information created in the course of running a business or conducting an evaluation. In order to retrieve this information, someone first has to store it in electronic or paper files, preferably both. Paper files and

electronic files should be organized in a parallel structure. Barrington identifies four categories of files: 1) activity, 2) client, 3) process and 4) standard business files (financial, personnel, and administrative records). Activity files document how one spent one’s time and on which activity (*Daybooks*). Client files refer to the files associated with a particular project and should contain standardized sub-files. Process files refer to processes designated for improvement, for example, how to manage e-mail with multiple list serves. In these files, a consultant would store material from reflective practice concerning this practice or articles relating to improving that process.

Knowledge capture refers to ensuring that a consultant manages knowledge rather than thinks about managing it. Bluntly and crudely, this consists of bribing yourself, (“if I complete this task, I will give myself this reward”), or manipulating yourself (“I can’t invoice until I send out the monthly status report.”).

Knowledge retrieval justifies knowledge storage. Consistent with Barrington’s standardization imperative, the labels for the client files should identify the process (“proposal” or “work schedule”) and elements that identify the project, the client and the year. For example, a file for the work schedule in a formative evaluation of a clinic in 2012 would be labeled “Work Schedule FORM CLIN 2012”. Standardizing files in this way facilitates people other than the primary consultant being able to retrieve material with minimal learning.

Without pruning files, storage space disappears or becomes more expensive. Some material should be shredded after the final check is cashed; other material should go into long-term storage. Barrington uses a

two year mark to distinguish between short and long-term storage — hence the importance of including the year in the naming conventions for file labels. An archive map identifies the location of specific files in long-term storage. This map contains the label for the storage box, the names of the files therein and a brief description of each file.

Knowledge Translation refers to learning from experience. Reflective practice forms an essential component of learning. Barrington recommends writing at least three pages first thing each morning and a post project review involving everyone working on the project.

### Final Thoughts

A couple of things troubled me about this book, however. First, Barrington continually urges people to have a lawyer and an accountant, but some new consultants may have a very tight cash flow. It would have been useful to have a longer discussion on how to get this advice freely and cheaply. Second, while the highlights before each chapter should help to organize knowledge, the highlights in this book seemed more like teasers to get you to read more (“Learn the five steps involved in developing a knowledge management system”). When the steps are identified in the highlights, a quick review of the chapter becomes much easier. In this particular case, it was particularly irritating, as I could only identify four steps in the text.

My three-month-old copy is already “dog-eared” from referring to it for my second consulting project. And I haven’t even started developing a marketing or business plan. When I start on a marketing plan, I will probably have to buy another copy, a sure mark of a book with great utility.

# SEA

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We're on the web!  
[www.southeastevaluation.org](http://www.southeastevaluation.org)

The **Southeast Evaluation Association (SEA)** is a regional affiliate of the American Evaluation Association. We represent evaluators and evaluation-related professionals from the state, university, school system (local) and private sectors. Our members come from a variety of backgrounds: policy analysis, program auditing, teaching, program evaluation, and performance measurement. SEA's annual conference attracts nationally recognized speakers and participants from the entire southeast region. Several agencies use our programs and conferences as low cost training and networking opportunities for their employees.

**Annual membership** (\$30; \$10 for full-time students) offers reduced registration fees for the Annual Conference, Pre-Conference Workshop, Essential Skills Workshop, and the various training sessions held throughout the year. Members also periodically receive a newsletter throughout the year. The newsletter is a great way to keep up with the SEA activities and innovative research in the field of evaluation. If you have any questions, please don't hesitate to **email** us.

## *Suggestions*

SEA welcomes all ideas for topics for future workshops, brown bag lunches, newsletter articles, and conference sessions. Please contact [Bernadette Howard](#) with your ideas!

## *Thank You*

We sincerely thank the Newsletter Production Crew for their diligent work in publishing this newsletter:

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