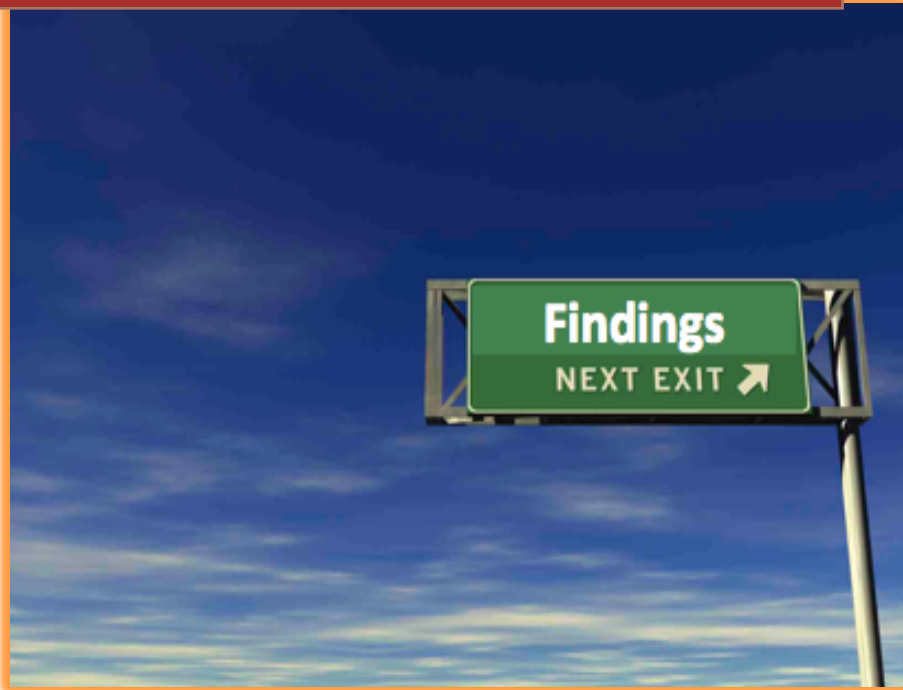




**JVA CONSULTING, LLC**  
*partners in community and social change*

# An Evaluation of the American Evaluation Association's Transition to Policy-Based Governance



**Report to American Evaluation Association:**

**Prepared by: JVA Consulting, LLC**

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## Executive Summary

### Introduction and Background

In January 2009, the Board of Directors of the American Evaluation Association (AEA) began operating under a policy-based governance approach based on the Policy Governance model developed by John Carver (Carver, 2006). The model was chosen because it is considered one of the more explicit models of governance, and had a strong emphasis on written and publicly available policies. The need for the new model, as expressed in Board documents, was spurred by challenges created by AEA's fairly rapid growth in membership, broadening of programs and services offered, and emerging role in national policy and beyond.

Overall, the evaluation of AEA's transition to policy-based governance was primarily intended to inform ongoing decisions about governance structures, processes and member engagement. Given concerns that have been identified by some AEA members about the move to policy-based governance, the evaluation was also intended to ensure that members had an opportunity to share their perceptions and experiences.

### Methodology

JVA Consulting, LLC (JVA) was contracted in June 2011 to lead the evaluation. JVA developed its approach around three overarching evaluation questions provided by the AEA.

- What have been the effects to date of the transition? In particular, to what extent are the desired outcomes being achieved?
- How well does the model of policy governance adopted by AEA fit the current needs of AEA?
- What are the possible implications of these evaluation findings for AEA?

To answer these questions, JVA leveraged several techniques to obtain information and reach impacted stakeholders. JVA utilized the following sources of information:

- **AEA Member Survey:** A member survey was designed around factors related to AEA's transition to policy-based governance and member satisfaction. Specifically, questions measured the following factors: participation in various AEA groups, awareness and knowledge of the transition, engagement and participation in AEA, and ratings of various policy-governance related factors and general governance factors.
- **Phone Interviews:** A phone interview script was designed to measure key AEA informants' perceptions of factors related to the transition to policy-based governance. Thirteen questions were divided into six themes, which included the following: functioning of AEA (in general and for specific groups); operation versus strategic focus; member engagement; accountability; transparency; and efficiency, continuity and explicitness.

- **Document Review.** AEA provided JVA all transition-related documents to help inform all stages of the project, from tool development to final report writing. These documents were especially useful, as the evaluation team possessed no prior knowledge of the governance transition.
- **Retreat Observations.** Two JVA staff members attended an AEA-sponsored retreat in Atlanta, Georgia in June 2011. At the retreat, key AEA leaders discussed next steps in the governance transition. The meeting facilitator was Michael Quinn Patton, past AEA President and policy-governance expert.
- **Interviews With Other Associations.** JVA contacted nine professional associations to learn more about their governance structures, use of Carver's Policy Governance model and satisfaction with the Carver model. Data obtained from this method was limited due to few associations agreeing to talk with JVA.

## Participants

The member survey was sent to 6,583 AEA members via email, with 734 members responding (11.2% response rate). Over two-thirds of respondents were female (69.5%, n=422), and the age of respondents varied widely. For the most part, the length of membership for survey respondents was evenly distributed, but slightly favored those who joined over three years ago (i.e., those who joined less than one year ago or one to two years ago were slightly less represented, 18.30% and 14.4%, respectively). Members with specific group involvement (e.g., Board, Priority Area Teams [PATs], Topical Interest Groups [TIGs], etc.) in the past five years were noticeably less represented in all groups (except TIG involvement, in which 27.50% [n=201] of members indicated involvement), with 4.24% (or fewer) involved in groups within the past five years. For example, only 1.92% (n=14) of all members responding indicated participation on a PAT, and only 1.78% (n=13) indicated participation on the Board.

Twenty-four key informants were contacted for phone interviews. These 24 informants represent all targeted key leader groups, with participation from current/past Board, current/past President, Executive Director and other key informants who were involved with the transition at various levels. Many of these individuals were either in support of, or had opposition to, the transition to policy-based governance.

- Surveyed members have very little familiarity with AEA governance in general (M=2.33), and even less familiarity with the transition specifically (M=1.88). Both these items were ranked on a five-point Likert-type scale, where 1=none/not at all and 5=very high. Governance familiarity varied by length of membership, with longer tenured members recording significantly higher familiarity ratings.
- Means for all general AEA governance ratings were above the mid-point on the five-point Likert-type scale (where 1=completely disagree and 5=completely agree). On average, members had at least some agreement that AEA governance is transparent, fair, equitable,



representative, accountable, strategic, efficient, precise, forward thinking and consistent. The lowest rated among these items was transparency ( $M=3.49$ ).

## Key Findings

The evaluation questions from AEA's RFP were used to frame this evaluation. As such, findings are presented using the evaluation questions as a framework. The evaluation questions, with subsequent findings, are as follows:

1. **What have been the effects to date of the transition? In particular, to what extent are the desired outcomes being achieved? These outcomes include the following:**

### Shift towards a strategic orientation and away from operations

The data suggest that there has been a shift away from operations and toward policy development, with 56.65% ( $n=120$ ) of surveyed members indicating they perceive a strategic change in AEA governance since 2009. Fifteen informants interviewed feel that there has been a shift toward policy and away from operations, while three feel that the board should not shift completely away from operations. Two informants feel that there is some confusion on what strategy is, and what true strategic thinking looks like.

### Shift related to continuity in strategic planning and direction of Board initiatives is lower in relation to other governance factors measured

Data from members (both those surveyed and interviewed) suggest this objective has not been achieved as strongly as some of the others. In rating changes since 2009, over two-thirds (68.1%,  $n=126$ ) of surveyed members feel that consistency has stayed "about the same." Although members may feel that consistency stayed the same (or perhaps slightly improved), this does not necessarily indicate that change on this dimension is not occurring. This may be an indication that members are not privy to witnessing how consistency and continuity are represented in policy-based governance.

### Shift related to Board accountability is lower in relation to other governance factors measured

As was seen with continuity, there was not clear evidence that this objective has been achieved, with 67% ( $n=118$ ) of surveyed members indicating that they feel that general governance accountability has stayed the same since 2009, and key informants providing mixed responses as to the degree of change in accountability and how it has changed (eight informants feel it has increased, and five feel that it has not changed or decreased).

### Governance transparency was rated moderately well, with many members feeling transparency has increased

Over one-half of surveyed members feel transparency of AEA governance in general has increased since 2009 (51.9%,  $n=109$ ). However, although still falling within the "agree" side of the scale (scores above 3), ratings of current governance transparency received the lowest mean score ( $M=3.49$ ) when compared to other governance measures. Themes that emerged during key informant interviews slightly favor an increase in transparency, as well (8 informants).

Although there seems to be progress and some success on this dimension, themes that developed elsewhere (i.e., in open-ended survey responses) indicate there are still some obstacles when it comes to transparency.

#### **More opportunities for member involvement**

Results suggest that AEA has had an observable increase in member opportunities (or activities). However, the increase in member opportunities does not necessarily tie to a direct increase in member engagement in these opportunities, or to the model itself. In fact, when asked if they want to become more involved with AEA, 58.6% (n=292) indicated either “no” or “maybe—but not at this time.” For those who do want to be more engaged, member most often indicated that want a higher frequency of direct communication or different material on their communication from AEA. Key informants (12 informants) do feel that there has been an increase in the sheer number of opportunities available to members. However, some feel that there has been a decrease in the quality of these opportunities (4 informants). Others question whether members are really interested in becoming more engaged (3 informants).

#### **Mixed results related to whether or not the governance transition improved functioning among specific AEA groups**

Taken together, evaluation data present a variable picture as to whether or not functioning has been increased because of the transition. Upon reviewing group ratings of current functioning and functioning improvement, it appears that functioning is at a moderately high level currently among the groups, and has been improving. However, these results are tempered somewhat by the comments received from key informants. Considering both responses to open-ended questions and key informant comments, it appears that although functioning has improved somewhat, there is still a good deal of work to be done in this arena, particularly when deciding what the future structure of the PATs will look like (11 informants).

#### **Mixed results related to whether or not the governance transition decreased AMC resources being spent to support various AEA groups**

It does not appear that this objective is being met currently. Although the data were somewhat limited to address this outcome, data received indicate an increase in resources spent in some areas (increased time spent with Task Forces), and decreases in others (decreased time spent with PATs). Therefore, it appears that there has not been a net increase or a net decrease in resources spent by the AMC as a result of the transition.

#### **Positive and negative unintended outcomes**

Surveyed members seem to be satisfied with AEA currently. Although satisfaction is not a primary outcome stated by the policy-based governance model, elements of satisfaction are inherent within many of the outcomes tested. When asked openly about what changed they have seen to AEA since 2009, members' comments most often fell into categories of “no change” or “increased electronic presence/social media.” In addition, there is other emerging information that may continue to impact the transition to policy-based governance. These factors are related to execution of the model, and suggest that there is too much emphasis on

the technicalities of Policy Governance, a lack of a clear understanding of the model, need for clearer model definitions, and a lack of strategy (and definition of what strategy is) despite the increased emphasis on policy. Communication was another issue that emerged as a major barrier to the transition.

**2. How well does the model of policy governance adopted by AEA fit the current needs of AEA?**

It appears that AEA's interpretation of Carver's Policy Governance is fitting the needs of AEA. This seems especially true when considering the direct questions asked throughout this evaluation and the themes and comments that emerged. Upon reviewing the data, it appears that there are other issues, beyond the model itself, which brought about resistance and negativity to the model. In fact, some of the strongest critics interviewed stated that they agreed with the model, but not the process in how the transition occurred.

**3. What are the possible implications of these evaluation findings for AEA?**

JVA perceives that AEA's transition to policy-based governance is progressing favorably and in a way that suggests the model can be customized to fit AEA's needs. This is evident by the positive ratings for all general governance and most group-level governance items, and movement of various governance dimensions in the intended direction (e.g., a shift away from operations, and a moderate increase in transparency). Although it is difficult to attribute any improvements to policy-based governance alone, and there are those who still disagree with the model (or the approach), AEA's continued willingness to modify the model to adjust to challenges presented herein should lead to additional positive outcomes in the future. Once other remaining barriers, such as lack of communication, model understanding and definitional knowledge (e.g., what is "strategy?") are addressed, AEA should find components of the model easier to implement.

## Introduction and Background

### Governance Transition

In January 2009, the Board of Directors of the American Evaluation Association (AEA) began operating under a policy-based governance approach based on the Policy Governance model developed by John Carver (Carver, 2006). The model was chosen because it was considered one of the more explicit models of governance, and because it had a strong emphasis on written and publicly available policies.

The need for the new model, as expressed in Board documents, was spurred by challenges created by the Association's fairly rapid growth in membership, broadening of programs and services offered, and nascent role in national policy and beyond. The challenges included increasingly more time spent by Board and its committees on operational rather than strategic planning issues, concerns for the lack of explicit description of priorities and thus continuity in direction, lack of written policies and strategic plans, volunteer opportunities largely restricted to standing committees, and a sense that the committees and overall structure were not operating smoothly. Moreover, participation on those committees was only possible by being appointed by the Board President. Numerous members perceived that this practice lacked inclusivity of AEA's growing membership.

The adoption of the model was therefore intended to:

- Provide a structure that increased the Board's focus on policy versus operations;
- Support continuity of strategic direction and initiatives by the Board providing a written basis for guiding the work of the Association;
- Increase the efficiency of the Board and its committees;
- Provide greater opportunities for volunteer involvement and member engagement;
- Create a more nimble structure for Board support; and
- Increase member engagement.

### Policy-Based Governance

Similar to Carver's Policy Governance, policy-based governance acknowledges members as the authority within the organization. Through their actions (e.g., electing Board members), members choose the type of leaders (i.e., Board) they want interpreting and communicating their interests within the organization. To see that the desires of the members are translated into direct actions (or operations) with the organization, the Board of Directors appoints an Executive Director (ED), and manages the ED's operation of the organization through specific policies. Through this structure, the Board becomes the direct link between members and the operation of the organization (i.e., the actions of the ED). However, members may give input both directly to the Board and to the Executive Director.

What makes policy-based governance (and Policy Governance) unique is the clear delineation of responsibilities within the organization, with the Executive Director being solely responsible for operations of the organization, and the Board focusing only on higher-order, non-operational, activities, such as policy development and strategy. Therefore, the Board does not engage in operations directly, but only through policies that it develops (as highlighted above).

The questions within this evaluation were designed around the goals of what policy-based governance should achieve. For example, less board time spent on operational activities and more time on policy and strategic planning are tied to directly to the structure of the policy-based governance approach.

### **Need for Evaluation**

Overall, the evaluation was primarily intended to inform ongoing decisions about governance structures and processes. Given concerns that have been identified by some members about the move to policy-based governance, the evaluation also intended to ensure that members had an opportunity to raise their concerns.

It was with the above issues in mind that AEA announced a request for proposals. Through an open and competitive bid process, AEA chose JVA Consulting, LLC (JVA) to conduct the evaluation. JVA has a balance of evaluation, planning, and governance and organizational leadership experience.<sup>1</sup>

As an additional stipulation, the evaluator chosen for this project must not have been a member of the AEA Board or a Board committee/Priority Area Team during the period 2008–2011 and otherwise be free from a conflict of interest or perception of conflict of interest. The current project began in early June 2011.

### **Evaluation Oversight**

A Transition Evaluation Oversight Task Force (Task Force) supervised the current evaluation. The Task Force, comprised of AEA members appointed by the AEA Board, provided oversight throughout the project continuum. This included the review of original task and timeline documents, review and approval of evaluation instruments, and review of the final draft report. The Task Force also reviewed the wording of all member correspondence as well as the operation of the online survey. The AEA Executive Director (ED) managed the legal and financial aspects of the contract for the evaluation. In addition, the ED provided JVA with operational support and AEA background information, as needed

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<sup>1</sup> See further information on JVA's capacity at [www.jvaconsulting.com](http://www.jvaconsulting.com)

## Evaluation Standards

The current evaluation strived to meet The Program Evaluation Standards (Standards) published by the Joint Committee on Standards for Educational Research (Yarbrough et al., 2011<sup>2</sup>).

Intended to increase the quality of evaluation, the Standards are organized around four key themes: utility standards, feasibility standards, proprietary standards and accuracy standards. A summary of these standards, and how JVA's addressed these standards, is included below.

- **Utility Standards.** Utility standards focus on an evaluation's value and usefulness to stakeholders and address evaluator credibility, attention to stakeholders, negotiated purposes, explicit values, relevant information, meaningful process and products, timely and appropriate communicating and reporting, concern for consequences and influence.

JVA's credibility stems from staff expertise in *both* evaluation- *and* governance-related content. JVA brought this experience to bear in the current evaluation. With the assistance of the Task Force overseeing this evaluation, JVA stayed focused on the usefulness of current evaluation, keeping processes and outcomes relevant and meaningful. Communication was done in a timely fashion and with careful considerations of the influence this evaluation may have on stakeholders.

- **Feasibility Standards.** Feasibility standards focus on factors related to increasing an evaluation's effectiveness and efficiency, and address project management, practical procedures, contextual viability and resource use.

Throughout the project continuum, JVA made adjustments to ensure the evaluation was operating as effectively and efficiently as possible with careful consideration given to the original scope of work, timeline, budget and requests from the Task Force. Any changes made were done after seeking the Task Force's feedback, and making considerations for the cultural and political interests and needs of individuals and groups within AEA.

- **Proprietary Standards.** Proprietary standards focus on ethical and justice factors (i.e., fair, legal, right and just), and address responsive and inclusive orientation, formal agreements, human rights, clarity and fairness, transparency and disclosure, conflicts of interest, and fiscal responsibilities.

Beginning with a project kick-off meeting, JVA made sure that all those involved in the evaluation (both internal JVA staff and the AEA Task Force), had a clear understanding of the project agreements, including how human rights would be protected (e.g., protection of privacy) throughout the project. When data were collected for use in this report, statements of intent were made clear to all participants. Survey participants were required to give consent before participating. Conflicts of interest, transparency and disclosure were considered

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<sup>2</sup> Yarbrough, D. B., Shulha, L. M., Hopson, R. K., & Caruthers, F. A. (2011). *The program evaluation standards: A guide for evaluators and evaluation users* (3<sup>rd</sup> ed.). Thousand Oaks, CA: Sage.

at every stage of the evaluation. The project remained fiscally responsible to AEA, with JVA assuming responsibility for any project cost overages. The current evaluation was open to all AEA members, ranging from the President to new association members. The evaluation made all efforts to account for all stakeholders in the current report.

- **Accuracy Standards.** Accuracy standards focus on the dependability and truthfulness of project outcomes, giving special focus to the representation of evaluation findings that are used for interpretation, judgments and decision-making. Specific considerations include justified conclusions and decisions, valid information, reliable information, explicit program and context descriptions, information management, sound designs and analyses, explicit evaluation reasoning, and communication and reporting.

The data presented herein represent many different sources of information. All data collection methods followed best practice approaches honed from JVA's expertise that were further refined to account for AEA's specific needs. The current report includes conclusions combining JVA's objective interpretation of the data with past governance-related experience. Conclusions reached herein are given the appropriate consideration. The report has been reviewed by sources within and external to JVA (i.e., Task Force), to ensure the truthfulness of statements. It should be noted that JVA staff members were not involved with any portion of governance transition, nor did they hold any position within AEA that would have made them privy to governance-related information.

## Methodology

JVA developed its approach around three overarching evaluation questions provided by AEA in the request for proposals (RFP) for the current evaluation. The questions, as stated in the RFP, are as follows:

1. What have been the effects to date of the transition? In particular, to what extent are the desired outcomes being achieved? These outcomes include the following:
  - Less Board time on operational issues and more time on policy and strategic planning;
  - More continuity in strategic planning and direction of Board initiatives;
  - More accountability of the Board;
  - Greater transparency of the Board actions;
  - Wider range of opportunities for member engagement in AEA activities;
  - Improved functioning of committees/Priority Area Teams (PATs), task forces, working groups;
  - Decreased AMC resources being spent to support these various groups and;
  - Degree of positive and negative unintended outcomes.
2. How well does the model of policy governance adopted by AEA fit the current needs of the Association?
3. What are the possible implications of these evaluation findings for AEA? (Note: responses to this question appear throughout the Conclusions and Recommendation section of this report).

To answer these questions, JVA leveraged several techniques to obtain information and reach impacted stakeholders. JVA utilized the following sources of information:

- **AEA Member Survey (see Appendix A):** A member survey was designed around factors related to AEA's transition to policy-based governance and member satisfaction. Specifically, questions measured the following factors: participation in various AEA groups, awareness and knowledge of the transition, engagement and participation in AEA, and ratings of various policy-governance related factors. Policy-based governance factors included ratings of AEA's focus on policy and operational activities, functioning of AEA (and specific AEA groups), and perception of member opportunities and engagement. The survey also included items related to general AEA governance. These included items to determine if members found governance to be: transparent, fair, equitable, representative, accountable, strategic, efficient, precise, forward thinking and consistent. Although the survey had some questions designed for members with a more intimate knowledge of AEA, there were several sections that remained relevant for less-involved or newer members. These sections were included to allow less-involved members to have a voice in the current evaluation.



**Process for Survey Development.** The survey was developed using a combination of factors highlighted in AEA's request for proposals, Task Force feedback and JVA's evaluation, governance and member assessment expertise. Using the above factors, JVA created a final version of the survey for Task Force review. Once the survey was submitted to the Task Force for review, JVA received feedback on survey content and structure. JVA went through several iterations of survey development with the Task Force. The need for multiple rounds of survey development was primarily driven by requests for changes and feedback from the Task Force. Once JVA accounted for the Task Force's vision for the survey, the final survey was edited and uploaded into SurveyMonkey. After the survey was built into SurveyMonkey, and all formatting completed (e.g., skip-logic), JVA put the survey through a final internal review process. Once JVA was settled on a final online survey format, the survey link was sent to the Task Force for review. During this phase, several more revisions were suggested to the flow of the survey (e.g., skip-logic). Once the Task Force signed-off on the online version of the survey, the survey link was embedded into a survey introduction letter and sent to the ED for delivery to members.

- **Phone Interviews Script (see Appendix B):** A phone interview script was designed to measure key AEA informants' perceptions of factors related to the transition to policy-based governance. Thirteen questions were divided into six themes, which included the following: functioning of AEA (in general and for specific groups); operation versus strategic focus; member engagement; accountability; transparency; and efficiency, continuity, and explicitness. Each theme included several probes to obtain richer information for each question. In addition, definitions of key terms and clarification of specific policy-based governance issues were provided throughout the interview. A final question in the interview included asking key informants who else within AEA should be contacted to participate in an interview.

**Process for Interview Script Development.** The process for interview script development followed a similar path as the member survey development. JVA created the interview script using a combination of factors highlighted in AEA's request for proposals, Task Force feedback and JVA's evaluation, governance and key informant measurement expertise. During script development, a special focus was given to key governance content areas and governance-related changes that key informants witnessed before during, and/or after the governance transition. In addition, a special focus was given to the amount of time needed to complete interviews. Using the above factors, JVA created a final version of the interview script for Task Force review. Once the survey was submitted to the Task Force for review, JVA received feedback on script content and structure. JVA went through several iterations of interview script development with the Task Force. The need for multiple rounds of script development was primarily driven by requests for changes and feedback from the Task Force. Once JVA accounted for the Task Force's vision for the script, it began scheduling key informant interviews.

- **Document Review.** AEA provided JVA transition-related documents to help inform all stages of the project, from tool development to final report writing. These documents were especially useful, as the evaluation team possessed no prior knowledge about the governance transition. Documents provided included Board Member orientation manuals, AEA's Policy-Based Governance Model orientation manual for Board and committee members, scope of work for Priority Area Teams, and Board Agendas. Additional documentation, highlighted during key informant phone interviews, included some of the governance research conducted leading up to the transition. This documentation provided comparisons of policy governance with other governance models, and organizations that use other models.
- **Retreat Observations.** Two JVA staff members attended an AEA-sponsored retreat that focused on next steps in the governance transition. JVA staff members were allowed to attend this two-day retreat to observe key AEA leaders as they discussed current governance issues and planned for the future.
- **Interviews With Other Associations.** JVA contacted nine national associations to learn more about their governance structures, use of Carver's Policy Governance model and satisfaction with that model.

### Approach to Analysis

Analysis of the member survey data and key informant interview data focused on evaluation questions outlined by AEA, which were driven by the intended outcomes of the transition to Policy-Based governance.

For quantitative analysis, descriptive analysis was run on all data, as well as basic exploratory analysis, to determine general interrelation among survey items. Where the data and specific evaluation questions warranted, additional procedures were used to test for mean differences among survey items. Analysts also tested the degree to which the relationship between two items varied as a function of a third survey item. This level of the analysis primarily focused on the degree to which familiarity with the transition and length of membership impacted specific outcomes. Procedures used throughout this process involved univariate procedures, including Analysis of Variance ANOVA. Significant findings are presented where appropriate. Statistical Package for the Social Sciences (SPSS) was used for all quantitative analysis.

A JVA analyst, less familiar with the project, conducted the qualitative analysis of the key informant interview data. The analyst did not conduct any of the key informant interviews. However, the analyst was provided background information on AEA's transition to policy-based governance, as well as materials related to the evaluation. All key informant interview data were screened to remove information that may have impacted confidentiality. Once the interview data were screened, the analyst used the qualitative analysis software, NVivo, to examine the data. Using this software, comments were organized into themes and sub-themes. Once developed, themes were applied to the AEA's evaluation questions. Remaining themes were still used to guide recommendations and are presented elsewhere throughout the report. Please

note that any comments that could be directly tied back to a specific key informant have been removed from the current report.

Beyond giving JVA context for AEA's transition to policy-based governance, the documents provided by AEA were analyzed to determine the degree to which they contained evidence related to policy governance. Evidence from these documents is presented throughout the report where appropriate.

Observations (i.e., notes) taken from the AEA governance retreat were primarily intended to give JVA further context for the evaluation. However, retreat notes were analyzed for common and connected themes related specifically to policy governance. Once themes were identified from retreat observations, JVA's governance expert reviewed and provided a synopsis for inclusion in this report. Evidence stemming from the retreat observations is presented throughout the report where appropriate.

Analysis of the association interviews was limited due to lack of participation. Originally attempting to contact five professional associations, JVA increased this number to nine due to lack of interest by organizations contacted. For each association, three direct phone calls were made, in addition to two follow-up emails. Out of the nine contacted, only three were willing to participate. Out of those participating, all had heard of Policy Governance, but none were using it currently. In addition, interviews with these three organizations suggested an unwillingness to discuss deeper governance issues with JVA. The minimal data obtained from these interviews are not included, as they do not further the goal of the current evaluation.

### Limitations

Limitations impacting the current report include those related to surveyed members' lack of familiarity with AEA governance, lack of specific AEA group representation within the survey, and overall response rate. Although three attempts were made to increase participation, it appears that those who did respond had very little knowledge of the transition, or AEA governance in general, and did not participate in many of the AEA groups impacted by the transition. For example, only 13 surveyed members wanted to provide further details regarding their participation on the Priority Area Teams (PATs) within the past five years. This lack of representation by the groups most heavily impacted by the transition should be considered while reviewing the current report. Although this is a limiting factor, the data received from the key informant interviews, as well as other documentations and observations, do allow a clearer picture to develop.

## Procedures and Participants

### Key Informant Interviews

The Task Force overseeing the current evaluation provided JVA with a list of 10 AEA informants involved with the transition. The list included the Executive Director, the current and past President, and seven other members who represented a wide-array of roles (and opinions) related to the transition. To ensure that the running list of key informants contacted was informant-driven, JVA was encouraged to use a snowball sample approach. That is, names of other potential interviewees were gathered during interviews from those already on the original list of key informants. From this sampling, JVA was able to obtain an additional 17 names, and successfully contacted 14 people suggested by other interviewees. It should be noted that those who were unable to participate in the current study, or who were identified and never contacted, will remain on a list for future follow-up. To schedule interviews, a direct email was sent to key informants. The email included a short description of the study, JVA contact information and a link to an online scheduling tool. Up to three email reminders were sent to each key informant, with several informants receiving direct phone calls from JVA staff. As new names were received, new email invitations to participate were sent. Although many key informants did not respond to email or voicemail, only one informant indicated that he/she did not want to participate. A total of 24 key informants were interviewed, with representation from all aforementioned groups received, including those opposed to, and supportive of, the transition.

### Member Survey

The Member Survey was delivered to all AEA members with a current email address. The link was embedded below a set of introduction letters written by the AEA President and JVA Project Director. The letter and link were sent using AEA's member email system (operated by the AMC). The survey was open for 27 days, during which three announcements were sent encouraging members to participate. All announcements included basic survey information and a clear survey close date. The first announcement, sent on August 16, 2011, included a letter of support from the AEA President, and an instructional letter from the JVA Project Director. The second announcement was included in AEA's monthly newsletter, sent to all AEA members on August 31, 2011. The final announcement was sent directly to all AEA members on September 6, 2011. The survey closed on September 11, 2011. In total, 734 AEA members started the survey,<sup>3</sup>

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<sup>3</sup> To be counted in this group, members must have given consent to take the survey and answered the first survey question. Sixteen members chose not to give consent, and were not included in the above.

with 630 completing the survey in its entirety (14.1% attrition rate). The AEA member database contained 6,583 individual member email addresses, for a survey response rate of 11.2%.

### Presentation of Survey Data

The survey data is presented by major governance transition theme. Although the current report pulls a variety of questions from the survey, governance-specific survey items were grouped into two major sections. The first section allowed those who are more involved with AEA (e.g., volunteering with a Priority Area Team [PAT], Topical Interest Group [TIG], Board, or other organized group within AEA), to tell JVA about their involvement with that group (for up to three groups). This section asked members to rate the group they volunteered with on a series of survey items. Included in this section was an open-ended question that asked members to summarize the activities of the group during the time they were volunteering.

A second major section was designed to measure general governance factors, which included factors tied to AEA governance in general, and not to one particular group. All members were allowed to provide ratings of the governance items within this section.<sup>4</sup> Members did not have to provide ratings for these items, and could indicate “not sure,” or could skip the item altogether. The evaluation team decided to allow all members to complete this section regardless of their familiarity with general AEA governance or the switch to policy-based governance.<sup>5</sup>

### Demographics

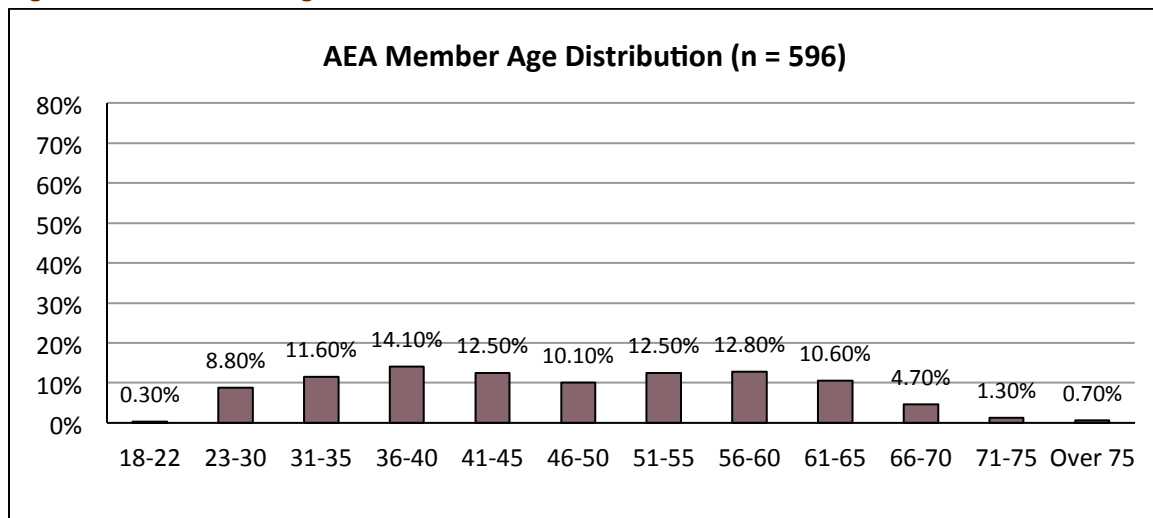
Over two-thirds of respondents were female (69.5%, n = 422), with males accounting for 30.3% (n = 184) of respondents. One member used the “other” option to write in transgendered. The age of respondents was widely distributed, with the largest group being the 36–40-year-old category (14.1%, n = 84). See Figure 1 for the full age distribution. Out of those who indicated whether they were a U.S. or international AEA member (n=623), 14.9% (n=93) were international members, with the remaining being U.S. members (84.4%, n=526). Of the 93 members indicating an international status, 90 members listed the country they most closely identify with. From those who chose to list a country, 28 different countries were listed, with Canada (36.6%, n=33), Australia (11.1%, n=10), and New Zealand (8.8%, n=8) having the highest international representation. The remaining 25 countries were mentioned less than three times.

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<sup>4</sup> All members with the exception of those who indicated they joined within the last year. New members were filtered past this section.

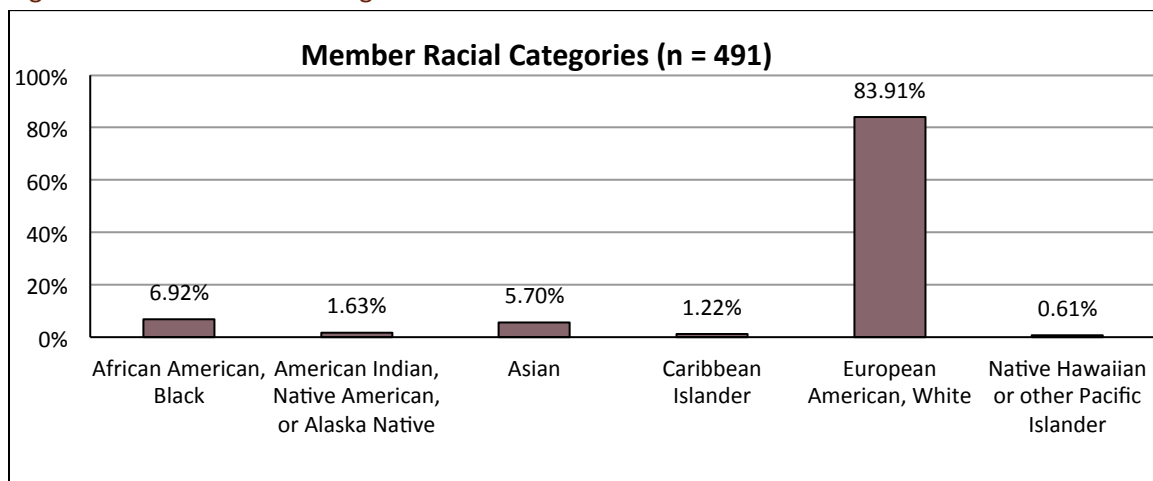
<sup>5</sup> JVA originally had the survey structured such that only members at least minimally familiar with the governance transition were allowed to answer these questions. However, this filter was removed to account for a request from the Task Force.

Figure 1. AEA Member Age Distribution



Racial and ethnic categories (see Figure 2) were included on the survey, as well. A majority of respondents chose European American, White (83.9%, n= 412); followed at a distant second by African American, Black (6.9%, n = 34); Asian (5.7%, n = 28); American Indian, Native American, or Alaska Native (1.6%, n = 8); Caribbean Islander (1.2%, n= 6); and Native Hawaiian or other Pacific Islander (.6%, n=3). It should be noted that 240 (32.8%) respondents chose not to indicate a race. Most respondents indicated not Spanish, Hispanic, or Latino(a) (95%, n=455), with the 5% (n=24) choosing the Spanish, Hispanic, or Latino(a) option. Again, a large proportion of total respondents chose not to answer this question (34.8%, n=255, non-response).

Figure 2. Member Racial Categories

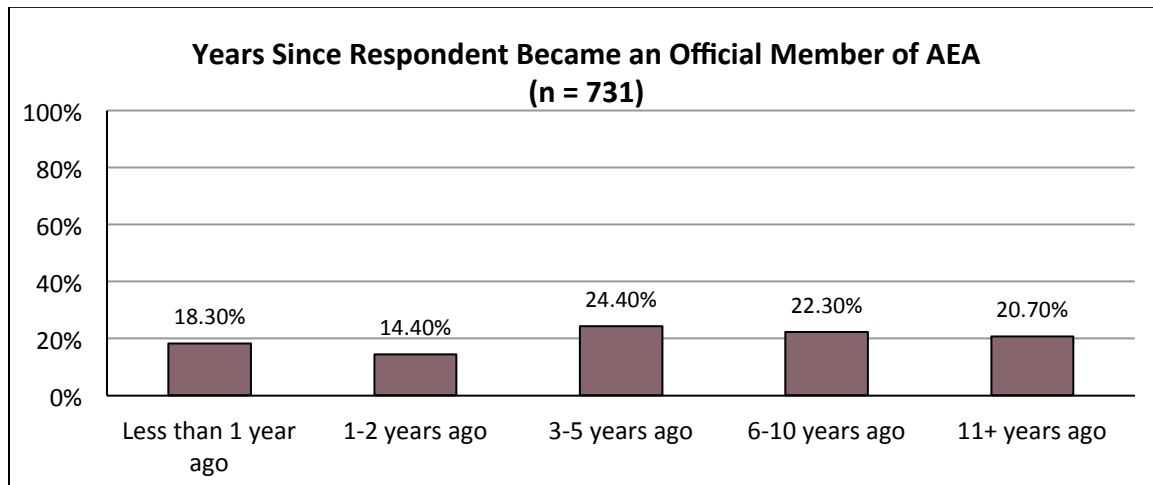


### Length of Membership and Involvement With AEA Groups and Other Activities

Respondents were also asked to indicate how long they have been members of AEA. Members could choose from five different categories: "Less than 1 year," "1–2 years," "3–5 years," "6–10 years," and "11+ years." This question was included on the survey to determine if member

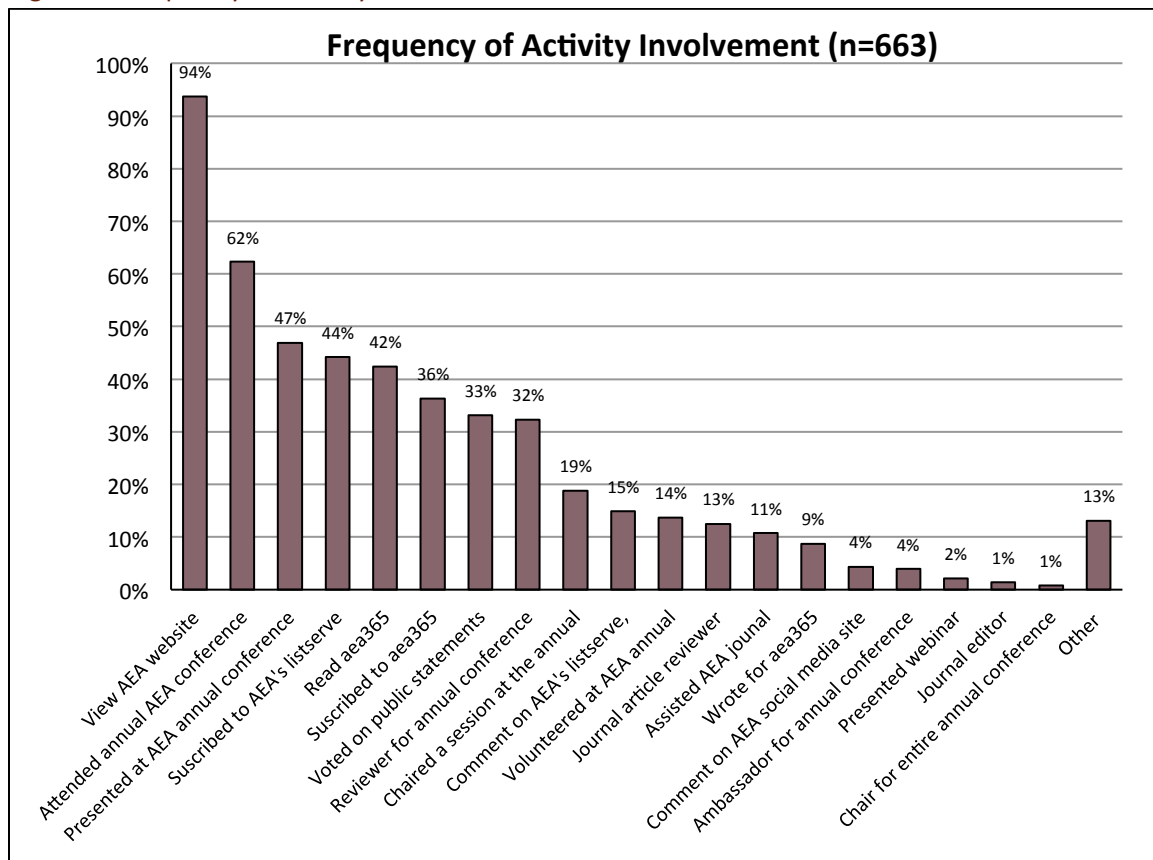
responses varied by length of AEA membership. Responses to this question fell somewhat evenly among the five categories given (see Figure 3).

Figure 3. Years Since Respondent Became an Official Member of AEA



Two additional survey items measured the ways in which members engage with AEA. The first item presented a checklist of 21 different activities that members have engaged with in the past. This list included passive engagement activities (i.e., viewing the AEA website) through very active engagement activities (i.e., chairing the annual AEA conference or presenting an AEA webinar). Figure 4 presents involvement in these activities for all members (including those who joined AEA within the past year). Note that members could indicate more than one category for involvement, meaning the total sum is greater than 100 percent.

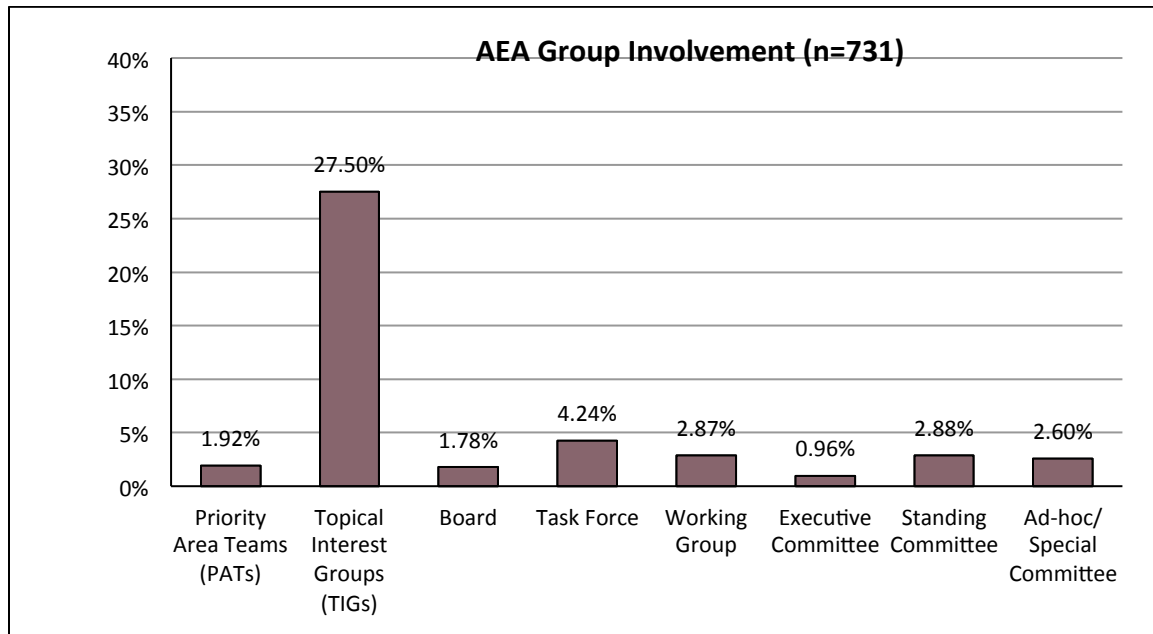
Figure 4. Frequency of Activity Involvement



Members could also indicate if they were involved with a specific group within AEA. However, members were asked to limit their responses to groups that they were involved with in the past five years. Responses to this item indicate that although there was moderate involvement in Topical Interest Groups (27.5%, n=201), the remaining AEA groups had much less representation in the current survey (see Figure 5).



Figure 5. AEA Group Involvement



#### Who Was Included in the Analysis

Those members who chose the “Joined less than 1 year ago,” (n=134) option, as displayed in Figure 3 above, were filtered away from the governance-related questions in the Member Survey, and therefore, are not included in the analyses herein. New AEA members were only asked to complete basic AEA satisfaction and general engagement items. This decision was made as evaluators felt that new members would not have adequate information to answer any of the governance-related survey items. JVA will provide these data to the Task Force overseeing this evaluation so they may conduct a further analysis on this group in the future, should they choose.

## Findings

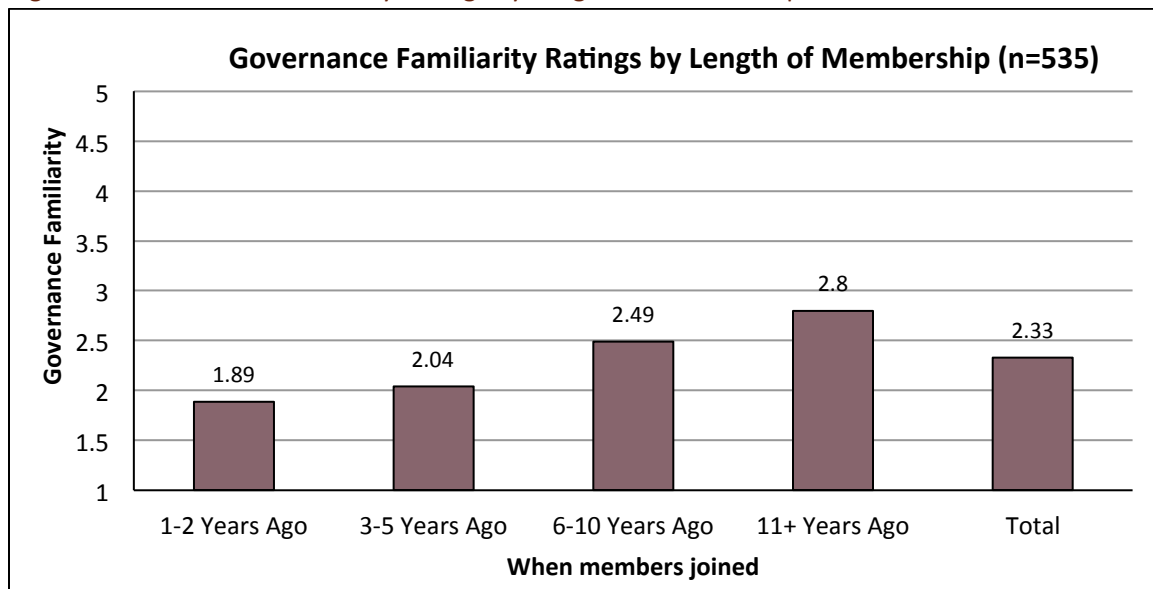
Sections are organized by evaluation question and include supporting data from the member survey, key informant interviews, retreat observations and document review, where appropriate. The evaluation questions are used as a framework for presentation. Throughout the presentation of qualitative data below, a theme is presented and direct quotes that exemplify a theme or finding are provided. In addition to the qualitative data informing the specific evaluation questions, several additional themes emerged throughout analysis and are included below. Frequencies for all major survey items are included as an appendix (see Appendix C).

### Member Governance Familiarity and Transition-Related Knowledge

Each of the key informants identified for interviews in the current investigation had at least a moderate understanding and awareness of the transition. This is not surprising given that the pool of individuals and the follow-up snowball sampling extended out from Task Force-initiated names, with many individuals interviewed having attended the Policy-Based Governance Retreat held in Atlanta in June 2011. Although it is important to focus on those intimately aware of AEA's governance transition, it is equally important to determine the degree to which the member base (i.e., those surveyed) is aware of the transition and the general governance of AEA.

Evaluators included two survey items in the member survey to obtain a better understanding of each member's governance familiarity and transition knowledge. These results are presented here to give context to later results, as those who are less familiar with general governance and the transition more specifically may not have adequate context for governance-related ratings. Using a five-point Likert-type scale (where 1 = not at all and 5 = very), members were asked to rate their familiarity with how AEA is governed (or run). Mean (*M*) ratings of this measure indicated a low governance familiarity among surveyed members (*M*=2.33, Standard Deviation (*SD*)=.99). When asked more specifically about knowledge regarding AEA's transition to a new structure for governing the organization (using a similar scale), average ratings were low as well (*M*=1.88, *SD*=.98). Even for the longest-tenured members, transition knowledge remained low (see Figure 6, below).

Figure 6. Governance Familiarity Ratings by Length of Membership



To explore these differences further, investigators conducted an Analysis of Variance (ANOVA) to determine if governance familiarity and transition knowledge significantly varied by membership-length categories. Results suggest a significant difference between membership-length categories and governance familiarity ( $F(3,531) = 24.77, p=.00$ ). Note that the data meet normality distribution assumptions for conducting ANOVA, including Kurtosis values (Kurtosis = -.085, SE = .211).

For governance familiarity, Tukey post-hoc comparisons suggest that those who have been members for 11 years or more report significantly higher familiarity ( $M=2.80$ ) when compared to those who joined 6–10 years ago ( $M=2.49$ ), 3–5 years ago ( $M=2.04$ ) and 1–2 years ago ( $M=1.89$ ). In addition, members stating that they joined 1–2 years ago and 3–5 years ago were not significantly different in their ratings of governance familiarity. Finally, members indicating that they joined 6–10 years ago reported significantly more governance familiarity than those who joined 1–2 years ago and 3–5 years ago.

These results suggest that members who joined within the past five years, that is those who joined immediately before *and* immediately after the transition to policy-based governance occurred, have a similar familiarity and knowledge regarding how AEA is run (with increased familiarity and knowledge among those with longer AEA tenures).

### What have been the effects to date of the transition?

As previously mentioned, one of the areas of focus for the current evaluation is measuring the effects of the transition to policy-based governance, and perceptions of AEA governance in general. Specifically, the evaluation was designed to measure the degree to which intended transition outcomes are being realized within AEA. The following section discusses the degree to which there was evidence for each of the outcomes that AEA had intended to result from the

transition to policy-based governance. Each of these outcomes, again, were developed to somewhat mirror Carver's expectations of the transition to policy governance. Therefore, the degree to which each heading below is present in the data represents the degree to which AEA's interpretation of policy governance is present within AEA.

### A Snapshot of Survey Ratings Across General Governance Items and Group-Specific Items

#### General Governance Items

Table 1 presents mean ratings and standard deviations (SD) from all items included in the general governance section of the member survey. This section included a series of governance-related items and asked members "to what degree do you think the governance of AEA is..." This statement was followed by 10 items that members could rate using a 1 (not at all) through 5 (very much) on a Likert-type scale. Although individual items are presented in their respective sections below, organized by evaluation section, they are provided on a single table here (see Table 1) to give a broad overview of general governance items.

*Table 1. Mean Ratings and Standard Deviations for General Governance Items*

To what degree do you think AEA governance is...	<i>M</i>	<i>SD</i>
Transparent	3.49	0.96
Fair (processes are free from bias)	3.82	0.87
Equitable to all members	3.74	0.95
Representative (has your interests in mind)	3.64	0.99
Accountable (is held responsible for its actions)	3.85	0.91
Strategic (deliberate in its goals and plans)	4.08	0.78
Efficient	3.89	0.91
Precise (detailed and exacting in its planning)	3.83	0.88
Forward thinking	4.02	0.89
Consistent (constantly adhering to the same principles)	4.05	0.76

Note: Sample ranged from 219 to 335, and did not include members who joined within the past year. Ratings were made using a 5-point Likert-type scale, where 1=not at all and 5=very much. Scores above 3 indicate a positive response (i.e., a response in-line with governance expectations).

#### Group-Specific Items

Similarly, Tables 2 and 3 below provide an overview of governance ratings for groups most heavily impacted by the transition (Board and PAT members). As previously discussed, this section on the survey was for members with increased involvement in specific AEA groups (within the past five years). For the group-specific section, members were asked to rate the degree to which they agreed with a series of group-level governance items (using a five-point Likert-type scale, where 1=completely disagree and 5=completely agree). Members could provide details for their involvement in up to three groups. Therefore, members could provide ratings of these group-level items up to three times (once per group, up to three groups). All group ratings are provided here to give an overview of these particular items. Specific items are discussed later, as necessary. A breakdown of all group-level ratings can be found in Appendix D.

*Table 2. Frequency of Agreement by Group Rating Items for Board of Directors*

Please rate the extent the group (Board)...	Comp. Disagree	Disagree	Neither agree/ disagree	Agree	Comp. Agree	M
Completely understands its role (n=9)	-	11.1%	11.1%	55.6%	22.2%	3.88
Has effective leadership (n=9)	-	-	11.1%	66.7%	22.2%	4.11
Has procedures that group members understand (n=9)	-	22.2%	11.1%	55.6%	11.1%	3.55
Has procedures that general AEA members understand (n=7)	-	28.6%	42.9%	28.6%		3.00
Is serving members of the group effectively (n=9)	-	11.1%	11.1%	66.7%	11.1%	3.77
Is serving general AEA members effectively (n=9)	-	11.1%	-	77.8%	11.1%	3.88
Is performing its role well (n=9)	-	11.1%	22.2%	55.6%	11.1%	3.66
Is including members from diverse backgrounds (n=9)	-	-	11.1%	55.6%	33.3%	4.22
Is functioning effectively (n=9)	-	-	33.3%	66.7%	-	3.66
Has improved its functioning since you joined (n=7)	-	14.3%	-	57.1%	28.6%	4.00
Note. Samples sizes values (i.e., n values) indicate the number of Board members (active in the past 5 years) who chose to provide ratings.						

*Table 3. Frequency of Agreement by Group Rating Items for Priority Area Teams (PATs)*

Please rate the extent the group (Priority Area Team)...	Comp. Disagree	Disagree	Neither agree/ disagree	Agree	Comp. Agree	M
Completely understands its role (n=12)	-	25%	17%	33%	25%	3.58
Has effective leadership (n=12)	-	25%	17%	25%	33%	3.66
Has procedures that group members understand (n=12)	-	25%	33%	25%	17%	3.33
Has procedures that general AEA members understand (n=10)	20%	10%	50%	10%	10%	2.80
Is serving members of the group effectively (n=9)	-	22%	33%	22%	22%	3.44
Is serving general AEA members effectively (n=6)	-	17%	33%	17%	33%	3.66
Is performing its role well (n=9)	-	33%	22%	11%	33%	3.44
Is including members from diverse backgrounds (n=11)	-	9%	9%	27%	55%	4.27
Is functioning effectively (n=11)	-	27%	18%	36%	18%	3.45
Has improved its functioning since you joined (n=10)	-	50%	10%	20%	20%	3.10
Note. Samples sizes values (i.e., n values) indicate the number of PAT members (active in the past 5 years) who chose to provide ratings.						

As can be seen by reviewing Tables 2 and 3, most group-level ratings for the Board fell on the positive side (i.e., above “neither agree/disagree”) on the 5-point scale. Frequency and mean scores for Board members providing ratings suggest that there is the most positive agreement on issues related to member diversity (is including members from a diverse background) and leadership (has effective leadership). Ratings also support the notion that the Board has been improving its functioning (i.e., has improved functioning since you joined). Table 2 also shows that perhaps the Board should, as appropriate, work on making processes easier for general members to understand. Making clearer distinctions as to what the Board does (and how it does

it), may allow members to become more informed, and ultimately change policy-governance-related perceptions (e.g., transparency, accountability), for the better.

Ratings from those involved with PATs show a similar pattern, with the diversity-related item receiving the highest marks, and “has procedures that general AEA members understand” scoring the lowest (see Table 3). In fact, this “understanding” item was one of the lowest rated items in the entire survey. Also of note is the fact that 50% of PATs member responding disagreed with the statement “has improved functioning since you joined.” At least some of the lower ratings on the score may be attributable to the change that the PATs have undergone since the transition. It is clear from both the retreat notes and the documents AEA provided (and key informant interviews), that the change in PAT structure created a sense of confusion for those involved.

JVA noticed that AEA's Board Governance Policies contain language about Board Committees; in section 16 it states: *The sole responsibility of Board Committees is to provide policy guidance to the Board.* In the next section, it states five priority areas and implies that the following are committees: Finance, Knowledge and Professional Support, Leadership, Public Engagement and Values. Under 18A, the policy reads: *For 2011, the former Board Standing Committees work within the Priority Area Teams established by the Board.* JVA understands this policy, and AEA staff members explained that the committees are now called PATs, yet some informants still call them committees. In addition at the retreat in June, the facilitator consistently called the Board's working groups PATs, yet he made what seemed to be contradictory remarks about the future of those working groups. For example, he stated, “committees would not exist in the future.” Then, a few moments later he said that they “would exist in the future.” An interpretation of this statement may be that the functions will exist, but possibly in a different form.

Re-naming the board working groups has caused confusion and seems to continue to be problematic. Moreover, most, if not all, working groups go beyond providing policy guidance. As is discussed elsewhere, the naming and role of the PATs will need to be addressed further as AEA decides its next steps.

### Shift Related to Strategic Orientation and Operations

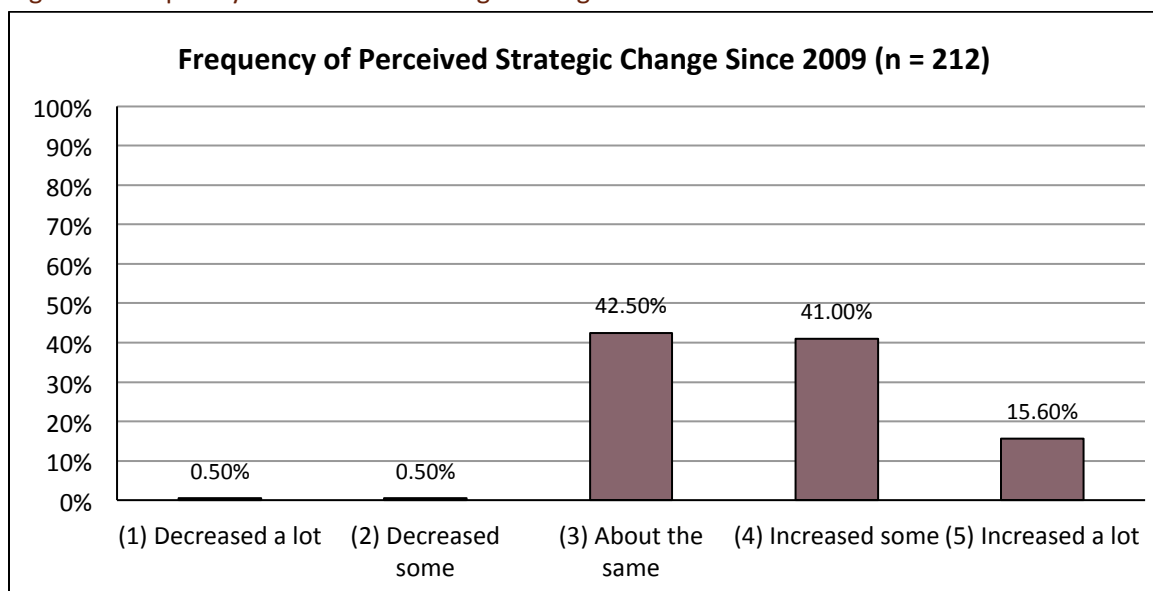
This question was hard to answer based on survey responses alone. Out of the 13 AEA Board members who completed the survey, only nine chose to complete the group participation section of the survey. Among the nine Board Members who responded, three ended their Board positions before the transition (prior to 2009), four were involved on the Board during the transition (on Board in 2009), and two Board Members began their participation after the transition (joined after 2009). Although there were no survey items directly related to the shift toward policy and planning and away from operations, one Board member's summary of his/her activities on the board hint that the Board was intentional about focusing more on policy development and strategic planning once the transition began, saying his/her activities were: “focused on strategic planning, addressing policies and procedures affecting the organization...”

Although this comment is a single example, it is supported by what was found in the key informant interviews discussed below.

Beyond the group participation section, members could also rate their perception on various factors related to AEA governance in general. One of these items asked members to rate the degree to which they think AEA governance is strategic (defined as deliberate in goals and plans). This item was measured twice, once as what members perceive currently (using a five-point Likert-type scale, where 1=not at all and 5=very much) and a second time to determine if they feel this factor has changed since 2009 (using a five-point Likert-type scale, where 1=decreased a lot, 3=about the same, and 5=increased a lot). Although all members were allowed to participate in this section regardless of their self-reported familiarity with AEA governance, they could indicate “not sure” or simply not respond to any item they did not feel comfortable answering.

Results suggest that members currently perceive the governance of AEA to be strategic ( $M=4.08$ ,  $SD=.77$ ,  $n=321$ ). This mean rating was the highest rated item among the current governance perception items. In terms of perceived change, many members feel that AEA has increased its strategic focus since 2009 ( $M=3.71$ ,  $SD=.75$ ,  $n=212$ ). Although this rating is somewhat close to a rating of three (i.e., no perceived change), the variability of this score (i.e., standard deviation) suggests that a majority of members feel there has been at least a small increase in governance strategy since 2009 (i.e., scores above three are on the increased side of the scale continuum). Figure 7 presents the frequency of responses for this item. As can be seen by reviewing Figure 7, a majority of members feel that AEA governance has increased in its strategic focus.

Figure 7. Frequency of Perceived Strategic Change Since 2009



Upon analyzing current perceptions further, members' mean ratings of the strategic items do not vary by length of membership or by familiarity with governance, nor are these items significantly correlated with length of membership or familiarity with governance.

Those who reported that the degree to which AEA is strategic is "about the same," may have responded as such because AEA's vision is written as a purpose statement rather than what the world will look like when AEA has achieved its goals. Additionally, an overall summary of the goals either doesn't exist or is not publicized. JVA reviewed AEA's Goals Policies that were most recently updated in January 2011. The Goals Policies are organized into five sections:

1. Evaluators
2. Evaluation Users
3. Public
4. Organization
5. Priorities

It is JVA's understanding that the last section (Priorities) helps to set the strategic direction of AEA, but the information contained in this section is brief and seems only to set the priorities for the Association Management Committee and not the board and staff combined. Following is the complete text in the Goals Policies about the FY2012 priorities:

Priority Areas for the Association Management Company for FY2012 (July 1, 2011 through June 30, 2012) will be as follows:

- A. Priority: A priority for new efforts will be outreach to evaluation users and the public to increase the value of evaluation to society at a budgetary allocation of up to a total of \$50,000 across FY2011 and FY2012.
- B. Priority: A priority for new efforts will be 1a-f, engage diverse communities in evaluation practice and contribute to inclusiveness and diversity through evaluation, through engaging the board, committees, broader membership, and staff taking into consideration the report from the multicultural task force at a budgetary allocation of up to \$40,000 across FY2011 and FY2012.
- C. Priority: A priority for new efforts will be strengthening our organizational goal (4A) by actively building bridges across methodological divides and advancing methodological pluralism with AEA at a budgetary allocation of up \$5,000 across FY2012 and FY2013.  
*Note, 4A is: AEA will contribute to society through building and sustaining a respectful, welcoming, inclusive, fun community.*

JVA believes that it is important to point out that if the above items are considered top priorities, then the board may want to consider allocating additional financial resources toward those priorities. The funds allocated don't necessarily reflect real costs of implementation.

JVA did not review any other documents that described AEA's strategy or overall goals.

Interviews with key informants provided more insight into AEA's shift away from operational activities and toward policy and strategy. Some of the key themes include the following.



***Many informants (15 informants) feel that there has been a shift toward policy and away from operations. In addition, beyond indicating that the shift has occurred, key informants support the idea that the board should not deal with operational issues.***

*"More focus on policy development and to some extent, goals and plans. Not on operations. I think the think that's happened, we've gotten focused on the development of policies, but not so much on strategic thinking going into the future"*

*"Yes...very clear emphasis on formalizing policies. It wasn't that policy didn't exist. It was just scattered before. The 4-categories of PBG became a structure for bringing it [governance] to others [other members]"*

*"The board has become more focused on policy...I think the board has been persistent on trying to adhere to, and make clear distinctions between, policy versus operations"*

*"Our discussions have moved to be more forward looking and policy oriented. For me personally, once we got to that point, it was more exciting to think about our work in terms of strategic planning and values as opposed to the reporting of what committees were doing"*

*"The whole idea is that you clarify the role of board members in an association like AEA and especially that you move board members away from the idea that they are managers and implementers of program-side activities. You move them to recognition that their primary role is policy making. This is a huge shift for organizations like AEA"*

*Not all key informants agree that the Board should move away from operations completely. This appears to be a normative disagreement, and not simply a misunderstanding of policy-based governance (3 informants). That is, key informants who think the board should deal more with operations tend to understand that this is against the tenants of policy-based governance, but they want to continue addressing some operations anyway, such as fiscal management.*

#### **A. Should not move away from operations completely**

*"I don't think [the board] should entirely let go of operations"*

*"The board needs to work on policies and be aware of big operational issues. Both things can happen"*

*"It's not OK to only think about the global level. Both are important. We cannot survive at just the micro level or at the global level"*

*"You may say this [financial management] is operations, yet the person I elect [to the board] should be watching out for these kinds of issues that the organization stands for and I care about"*

A couple of key informants also feel that there is not enough focus on strategy; during interviews it became apparent to JVA that numerous informants confused a focus on policy with a focus on strategy.

#### **B. Not enough focus on, or confusion around, strategy**

*"Despite more time spent on policies, there appears to be less time spent on strategy. In part this appears to be the result of confusion on what the difference is between policy and strategy"*

*"I didn't see much focus on strategic thinking in 2010, the board was still bogged down by trying to affect public relations damage from the transition...I don't see major strategy yet because they have been so busy with the transition"*

*"I don't feel like [the board has] done much strategic planning"*

*"The board previously had no strategic direction. The board now has strategic direction [in reference to policies]"*

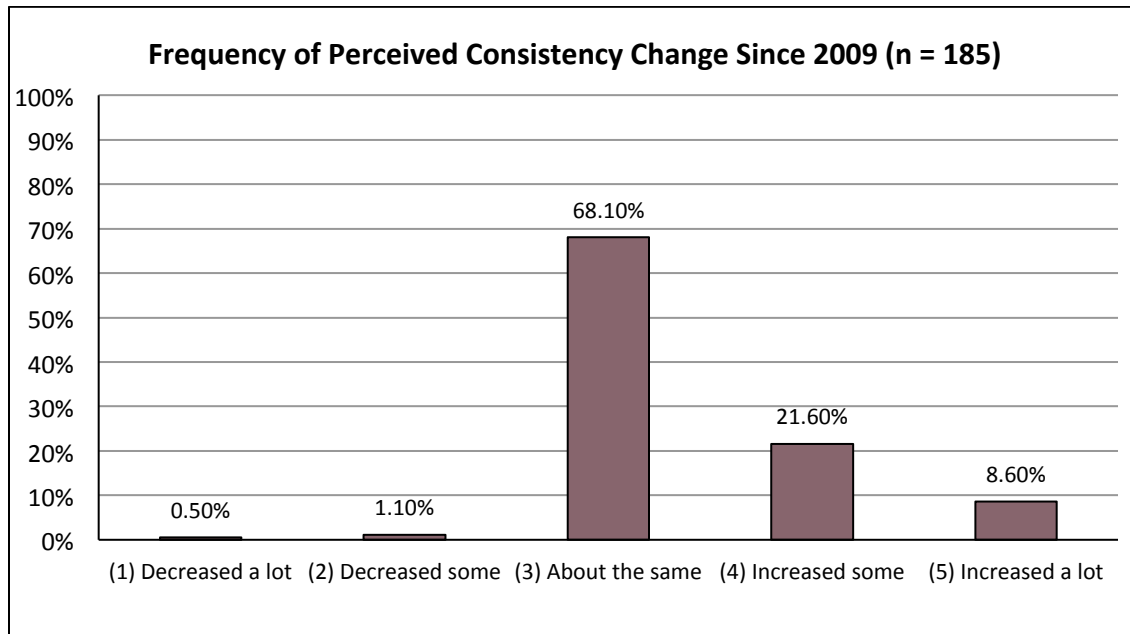
*"We are way more strategic now. We're always discussing policies"*

Upon speaking with key informants, it is clear that AEA has made a shift away from operations. However, there continues to be a few individuals who do not support this shift. Although it is clear that there has been a much stronger focus on policies currently within AEA, there seems to be a continued confusion regarding what strategic focus looks like within AEA. In addition, key informants also seem to confuse a focus on strategy with a focus on policy. Part of the reason for this is that AEA is using its Goal Policies as the only place through which to capture its strategy. AEA does not seem to have intentional outreach to members about its overall vision and top priorities.

### **Shift Related to Continuity in Strategic Planning and Board Initiatives**

Since evaluators felt continuity was too abstract to ask about directly in the survey, an item that asked members to rate how consistent they feel AEA governance is (using a five-point Likert-type scale, where 1=not at all and 5=very much) was used instead. Consistent was defined for members as "constantly adhering to the same principles." Surveyed members rated this item high ( $M=4.05$ ,  $SD=.764$ ,  $n=269$ ). Despite high current ratings for consistency, members don't appear to perceive much change from 2009. Using a five-point Likert-type scale (where 1=decreased a lot, 3=about the same, and 5=increased a lot), members indicated there was a slight increase in governance consistency since 2009 ( $M=3.37$ ,  $SD=.680$ ,  $n=185$ , see Figure 8). Although the mean of this item favors an increase since 2009, the variability of this item suggests that more members feel that there has been less of an increase in consistency over the past few years (when compared to other governance-change survey items). Although all members were allowed to participate in this section regardless of their self-reported familiarity with AEA governance, they could indicate "not sure" or simply not respond to any item they did not feel comfortable answering. Figure 6 provides a clearer picture of where change-related ratings fell along the decreased-increased continuum. As stated above, not as many members feel that there was a change in governance consistency since 2009. In fact, over two-thirds of members (68.1%,  $n=126$ ) indicated that consistency is "about the same" (see Figure 8, below).

Figure 8. Frequency of Perceived Consistency Change Since 2009



Although members may feel that consistency has mostly stayed the same (or slightly improved), this does not necessarily mean that this change is not occurring. This may also be an indication that members are not privy to witnessing how consistency (and continuity) is represented in policy-based governance, or perhaps are too far removed from the year-over-year baseline that is needed to truly make a judgment that change is consistent and or continuous. In addition, this lack of perceived change since 2009 may be partially attributed to the high ratings that members gave to the “consistent” item when providing general governance ratings ( $M=4.05$ ,  $SD=.76$ ; see Table 1, above).

Upon analyzing current perceptions further, members’ ratings of the consistency items do not vary by length of membership or by familiarity with governance. In addition, consistency ratings were not significantly correlated with length of membership or familiarity with governance.

A question specifically asking key informants about their perceptions of continuity within AEA governance was included in the interview. Key informants were asked to relate their answer specifically to the transition to policy-based governance. The following themes developed in key informants’ responses. In general, there was not consensus among key informants regarding whether there is more or less continuity with AEA.

***Some key informants (6 informants) feel there is more continuity. However, not all responses provide clear evidence that this increase is because of policy-based governance. For example, some responses could be true if AEA selected a different model of governance.***

*“I think the cycle of reviewing the four goals areas each year is an example [of increased continuity]. We have well-defined policies now, this is a major step in continuity brought about by the transition”*

*"...it [policy-based governance] provided stability in knowing the whole, and issues within that framework, it provides a sense of stability"*

*"...giving that we have policies in writing that facilitates the likelihood of more continuity. That there is something that the leadership has in writing to look at to adhere to"*

*"As this becomes part of our culture, it will be harder for a future president to throw everything out, which was how it was in the 90's every new president had a new way of operating"*

*"I think the shift should enhance [continuity] because they should be working with the bigger picture, forecasting, connecting versus operational activities"*

*"We never had anything like that [continuity] before. If there was, it was provided by Susan and not leaders"*

***Alternatively, a couple key informants feel that there is less continuity, or the continuity that does happen occurs by chance as individuals take on roles (2 informants). One additional informant brought up the fact that there were structures in place prior to the transition that helped with continuity in governance (e.g., the three-year President rotation).***

*"I have a hard time seeing the continuity outside of retaining particular individuals to the position. I don't see how [the board has] created a structure like the continuity in the committees"*

*"There's continuity, but it's more individual in nature as they see an appropriate way to fulfill [roles]. It's pretty happenstance"*

*"Part of the way the leadership is structured, even before transition, such that the president serves 3 years, that facilitates continuity, as well"*

Reflecting the perceived consistency change on the Member Survey, key informants seem to slightly favor the notion that continuity has increased. In addition, some comments received in regards to this question suggest that the increase in continuity may partially be a function of the changes that occur when shifting to any new model of governance and not necessarily attributable to policy-based governance alone.

Part of the challenge in analyzing consistency and adherence to a strategic plan is that the board lacks clarity about AEA's strategic plan and there are differing perceptions of what strategy means. As one informant said, "I'm sure that AEA has a strategic plan. I haven't seen it, but I know they must have one."

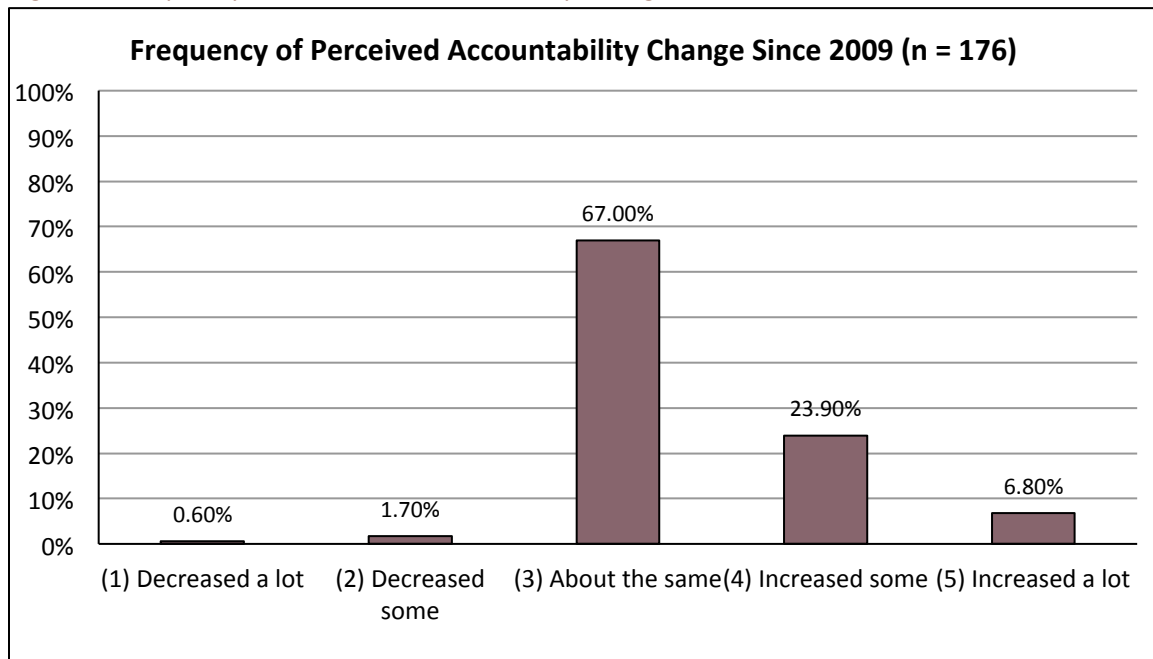
### **Shift Related to Governance Accountability**

Questions of accountability were also included in the member survey. Members could rate the degree to which they feel that AEA governance is currently accountable (on a five-point Likert-type scale where 1=not at all and 5=very much), and the degree to which they feel accountability of AEA governance has changed since 2009 (using a five-point Likert-type scale, where 1=decreased a lot, 3=about the same and 5=increased a lot). Members could choose "not sure" as a response, or could skip the question altogether. This item had the lowest response

overall, with 252 members rating their perceptions of accountability currently, and 176 rating the degree to which they feel accountability has changed since 2009. This is not surprising considering that processes in place for accountability may not be readily visible to some less-engaged members.

Members' ratings of current AEA governance accountability were moderate ( $M=3.85$ ,  $SD=.91$ ), with ratings of change since 2009 slightly favoring a perceived increase ( $M=3.35$ ,  $SD=.66$ ). Although mean ratings of perceived change in accountability favor an increase, the variability of responses suggests that there were many members who perceived no change in accountability since 2009. Frequency of accountability change ratings (see Figure 9) closely mirror members' ratings of governance consistency (highlighted in the previous section), with over two-thirds feeling that the accountability of AEA's governance is "about the same."

Figure 9. Frequency of Perceived Accountability Change Since 2009



Upon analyzing current perceptions of accountability and perceptions of change further, members' ratings do not vary by length of membership or by familiarity with governance. In addition, accountability ratings were not significantly correlated with length of membership or familiarity with AEA governance.

A question specifically asking key informants about their perceptions of accountability within AEA governance was included in the phone interview script. Key informants were asked to relate their answer specifically to AEA's transition to policy-based governance. The following themes developed in key informants' responses. In general, there was not consensus on the transition's impact on accountability. The following themes and subsequent comments bear this out.

***Some key informants (4 informants) feel there is more accountability due to increased documentation (2 informants), an increased emphasis on evaluating board decisions (1 informant), and short-term shifts in attention due to a governance change (not necessarily tied to policy-based governance; 1 informant). A review of the comments provided suggest that key informants thought more globally about accountability and not necessarily accountability of the board alone.***

*"[The board] never had any accountability from what was happening from board meeting to board meeting. We had no written report that I can remember... Prior to Policy Governance, most of the board work was a mystery. Now, members can see how policies evolve"*

*"In terms of the financial aspect, we've had a budget review, that is a level of accountability"*

*"...certainly, this effort to do an evaluation of the transition is one level of accountability that the board has not had in the past"*

*"I would say that when you introduce a new model like this, spotlights get turned on the board. In the short term, there's more accountability"*

***Mirroring the perceived changes in accountability by survey respondents, some key informants (3 informants) feel there has been no change to accountability since the transition to policy-based governance.***

*"This is work in progress... I think it's a new idea that the board needs to be accountable as individuals and the collective"*

*"I think the issue is accountable for what and for whom? That's the issue. What does that mean?... So what are you [AEA governance] accountable for? To what extent is the board responsible for the management of the organization, and Susan's outfit? I don't think those accountability issues have changed"*

*"No. I don't know how the board has become more or less accountable...[The Board has] that intent. Whether it translates into actions is not yet clear, it's not systematic"*

***Some key informants feel there is less accountability, due to committee changes and a shift of accountability to the Executive Director (2 informants).***

*"From the committee side, it seems as though that accountability of those actually doing the work is diminished in terms of the liaison role"*

*"I don't understand where the accountability is [for the board] or what kind of oversight [its members] were elected to provide. The board provides oversight of Susan as an individual...I think she is a wonderful person who does a wonderful job, but I don't see how she can be held accountable for all of member engagement"*

As was seen with ratings and key informant comments surrounding continuity, it appears that accountability is still a work in progress. A majority of members who responded to the survey feel that accountability is about the same since 2009, with a second group of respondents

favoring a slight increase. It is not clear whether this perceived lack of change is due to members simply not knowing what accountability looks like within AEA governance. Alternatively, survey responses could simply reflect that issues of accountability do not impact the larger member base. Key informants did have clear opinions on issues of accountability. However, within these opinions, there was no clear consensus as to whether accountability increased, decreased, or stayed the same. Issues of accountability may come down to how it is defined with AEA governance. One key informant captured this notion, stating the following:

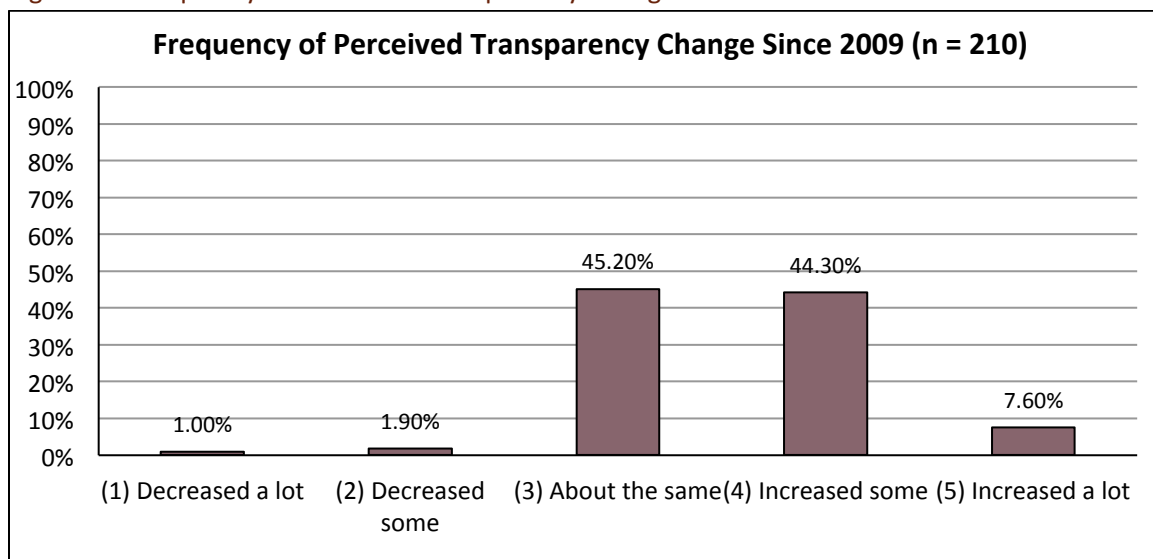
***"I think the issue is: Accountable for what and for whom? That's the issue. What does that mean?" [Stated rhetorically]***

### Shift Related to Governance Transparency

Surveyed members and key informants were also asked about transparency of AEA governance and the Board, respectively. Again, surveyed members were asked to rate their current perceptions of transparency within AEA governance (using a five-point Likert-type scale, where 1=not at all and 5=very much), and the degree to which they feel transparency of AEA governance has changed since 2009 (using a five-point Likert-type scale, where 1=decreased a lot, 3=about the same, and 5=increased a lot). Members could choose "not sure" as a response, or could skip the question altogether.

Members' ratings of current AEA governance transparency were the lowest of any governance item ( $M=3.49$ ,  $SD=.96$ ,  $n=316$ ), with ratings of change since 2009 demonstrating a perceived increase in transparency ( $M=3.56$ ,  $SD=.71$ ). Although mean ratings of current transparency were lower, perceptions of transparency change are more robust when compared to other items. That is, there are fewer members who felt transparency is "about the same" (or has decreased), than those who felt it has increased since 2009. See Figure 10 for frequency of transparency change ratings.

Figure 10. Frequency of Perceived Transparency Change Since 2009



Upon analyzing current perceptions of AEA governance transparency and perceptions of governance transparency change since 2009, members' ratings do not vary by length of membership or by familiarity with governance. In addition, transparency ratings were not significantly correlated with length of membership or familiarity with AEA governance.

Since the transition to policy-based governance, AEA has placed several governance documents on its website. AEA's bylaws are viewable online and there is a user-friendly, printable version available. AEA also makes the following policies available on its website: Goals Policies, Executive Limitations Policies, Delegation Policies and Governance Policies. Prior to the transition, JVA heard from interviewees that it was more difficult to discern the manner in which the Board made decisions as compared to now.

In addition, several of the June Board Retreat attendees mentioned to JVA that the staff should consider implementing greater transparency about the programs. For example, evaluation of the workshops is conducted at the annual conference and the summer institute, yet detailed findings are not shared with Board members (as reported by retreat attendees to JVA staff). Besides feedback from conference attendees, the Board would like to see which tracks were the most successful in terms of fewest workshop cancellations, attendance and feedback.

A question specifically asking key informants about their perceptions of transparency within AEA governance was included in the phone interview script. Key informants were asked to relate their answer specifically to AEA's transition to policy-based governance and talk about how they feel it has changed. The following themes developed in key informant responses. As was seen with key informant responses to the board accountability interview question, there was not consensus as to whether the board has become more or less transparent in recent years.

The following themes developed in response to this question:

***Key informants feel there is more transparency because of the transition to policy-based governance as evidenced by the posting of policies (5 informants), and other important documentation on the website, and the development of new forms of communication (3 informants).***

*"For the first time we have public written policies for all of the membership to see...It's a huge change for AEA. AEA was perceived as a closed organization that was not transparent"*

*"Every time [the board] does policies, I think [it] puts them out for comment and what's more I can see the history of those policies. I can see the currently approved policies. People can see what the board is doing. It's now a public process"*

*"I would tie this to the new model, in that [in the] past on the board there was sort of very internal, nothing was published, there was no opportunity for people to comment. I would tie it to the model"*



*"Minutes are now made available... There been a big effort to become more transparent at the annual meeting, at the conference, to have all board there, and make sure they are available for members to talk to"*

*"There's more transparency for members, more venues for people to know about AEA...so more transparency, and clearly more efforts on operations to be useful to members"*

***There was a key informant (1 informant) who felt that there is more transparency. However, this person felt that this increase could not be tied directly to policy-based governance, as many of these changes would have happened in the absence of the shift.***

*"I think that the board is becoming more transparent, but I'm not sure if it's because of policy-based governance or technology. Now, with websites and blog posts, all of this information is posted through multiple outlets. AEA has posted bylaws and policies. It's wonderful. I don't know if that is due to PBG. I think it was inevitable because of the technology"*

***A couple of key informants (2 informants) feel that there hasn't been much change in transparency, or feel that they need to explicitly see the Board agenda to make a determination on transparency.***

*"I can think of the financial aspects that have become more transparent, but I think prior treasurers have done this, too. The policies and bylaws are on the website, but this is passive transparency if you will. I don't see a big change one way or another"*

*"I have no idea because we don't see Board agenda and board meetings"*

***Finally, a single key informant felt that there was less transparency, and that the policy-based governance model is accepted without critical examination.***

*"PBG has created less transparency than there was previously because of people's lack of understanding or willingness to discuss it. It worries me. Too much is being accepted on faith which seems like a really odd position for an evaluation organization"*

Surveyed members perceive moderate levels of transparency in the current AEA governance structure, with the majority of members feeling transparency of AEA's governance has increased since 2009. It is impossible to determine from the survey alone why members feel there has been an increase in transparency since 2009. The increase in perceived changes since 2009 could be attributable to an increase in communication technology and reorganizing of AEA website postings, or from issues tied directly to policy-based governance. As can be seen by reviewing the above key informant themes, there is some evidence to suggest that the transition to policy-based governance positively impacted transparency. However, there was some disagreement. In general, AEA should build off of the success seen within its general efforts to be more transparent, while making a clearer distinction about what efforts can tie directly to AEA's interpretation of policy governance.

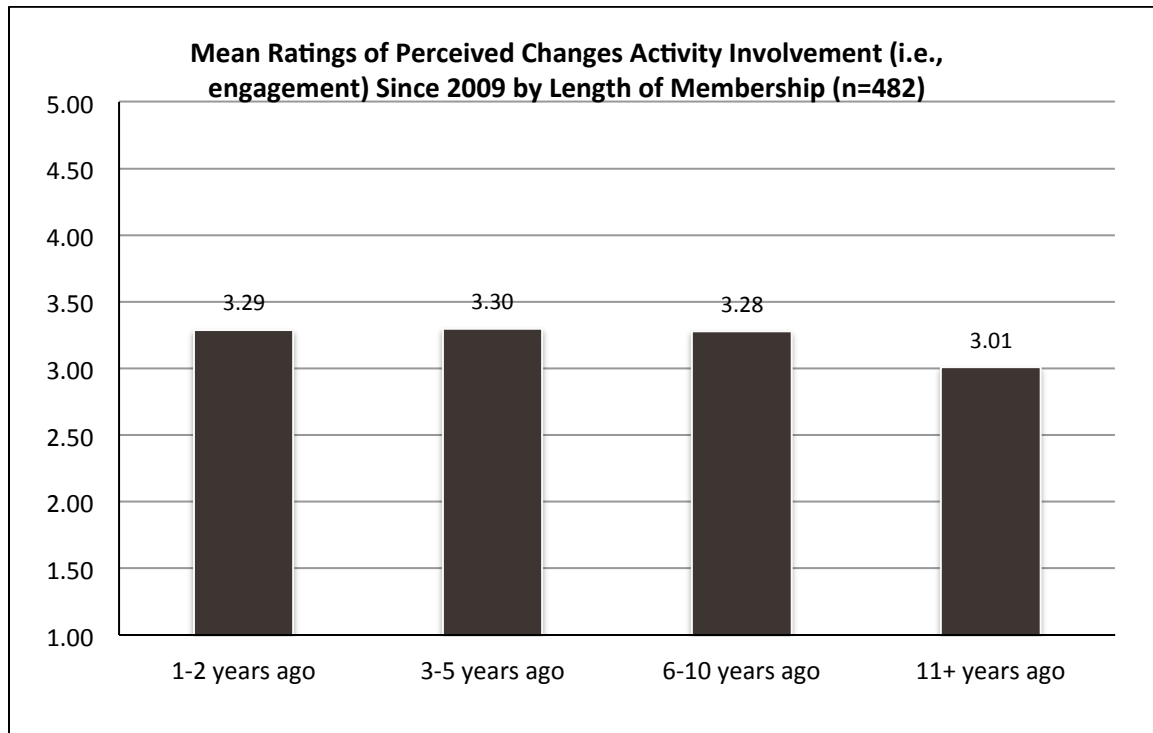
### Opportunities for Member Involvement

Two survey items were designed to address the member engagement opportunities. One item asked members if the number of activities available to them has changed since 2009 (using a five-point Likert scale, where 1=far fewer activities, 3=about the same, and 5=many more activities). The second survey item asked members to rate if they are more or less engaged with AEA roles and activities when compared to their involvement in 2009 (using a five-point Likert scale, where 1=much less engaged, 3=about the same, and 5=much more engaged). Members could also choose “not sure” or could skip these items altogether.

Ratings on both these items indicate members feel that both their opportunities for involvement ( $M=3.79$ ,  $SD=.82$ ,  $n=375$ ) and the degree to which they are engaged ( $M=3.22$ ,  $SD=.78$ ,  $n=482$ ) has increased since 2009. However, upon reviewing these ratings further, it is clear that opportunities for involvement have a higher perceived change than members' perceived engagement in these roles and activities. For the member opportunities item, a majority of respondents (65.6%,  $n=246$ ) indicated that members feel there has been at least “more activities” since 2009 ( $n=176$ ), with many members feeling as if there have been “many more activities” ( $n=70$ ). For the engagement items, more than half of members surveyed (57.70%,  $n=278$ ) feel that their engagement has not changed since 2009.

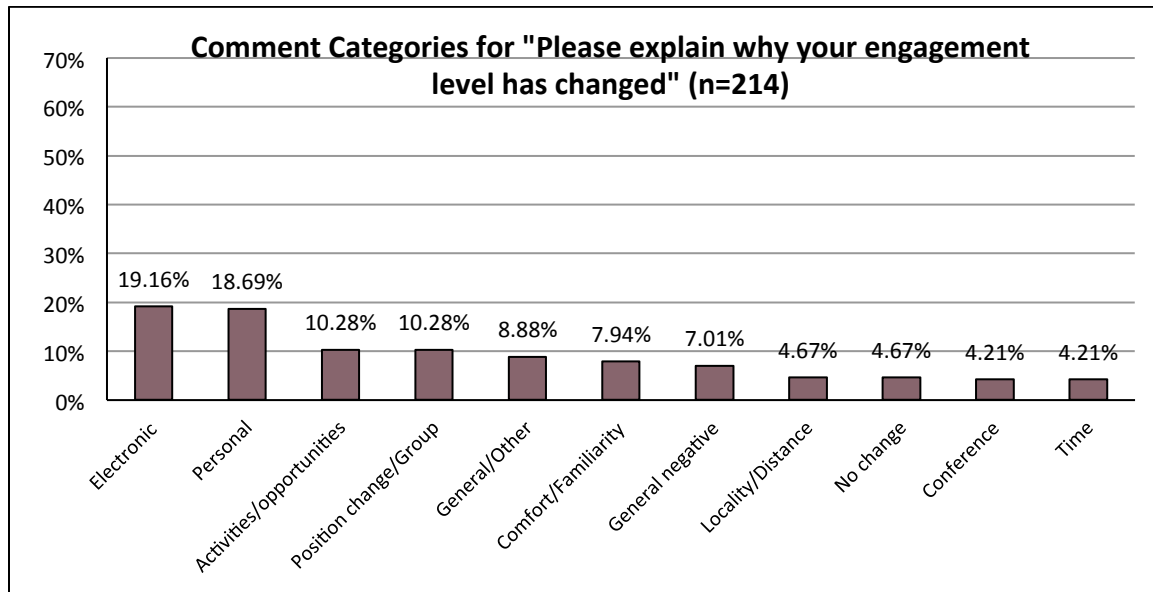
Further analysis indicates that ratings of perceived change in member engagement ( $F(3, 478)=2.48$ ,  $p=.01$ ) significantly vary by length of membership. Scores for changes in member engagement are just beyond the threshold to be considered in violation of normality assumptions for ANOVA (Kurtosis=.87,  $SE=.22$ ), but are interpreted and presented here as other normality assumptions (i.e., Skewness) are not violated (Skewness=-.06,  $SE=.11$ ). Tukey post-hoc comparisons for the perceived changes in engagement (see Figure 11) suggest the longest tenured members (joined 11+ years ago) indicated the least amount of change in engagement with AEA activities (since 2009). In fact, mean ratings for members joining 11+ years ago are near the midpoint on the scale ( $M=3.01$ ), indicating that this particular group changed its engagement very little since 2009. The mean ratings for those who joined 1–2 years ago, 3–5 years ago and 6–10 years ago were somewhat higher, and did not significantly vary from each other ( $M_s= 3.29$ , 3.30, and 3.28, respectively).

Figure 11. Mean Ratings of Engagement Changes (since 2009) by Length of Membership



In addition to indicating the extent to which their engagement has changed since 2009 (see above), members could provide follow-up comments as to why their engagement level changed (214 members commented; see Figure 12, below, for categories, and Appendix E for all comments). As can be seen below, close to one in five members indicated that electronic/online means of engagement (e.g., webinars, electronic correspondence) or personal reasons (e.g., change in employment status) led to a change in their engagement (19.2% [n=41] and 18.7% [n=40], respectively). Other categories include a change in activities and/or opportunities (10.3%), a specific position change (or joining/leaving a group) within AEA (10.3%), and an increase in comfort and/or familiarity with evaluation or with AEA (7.9%). Again, see Figure 12, below for other categories and Appendix E for comments.

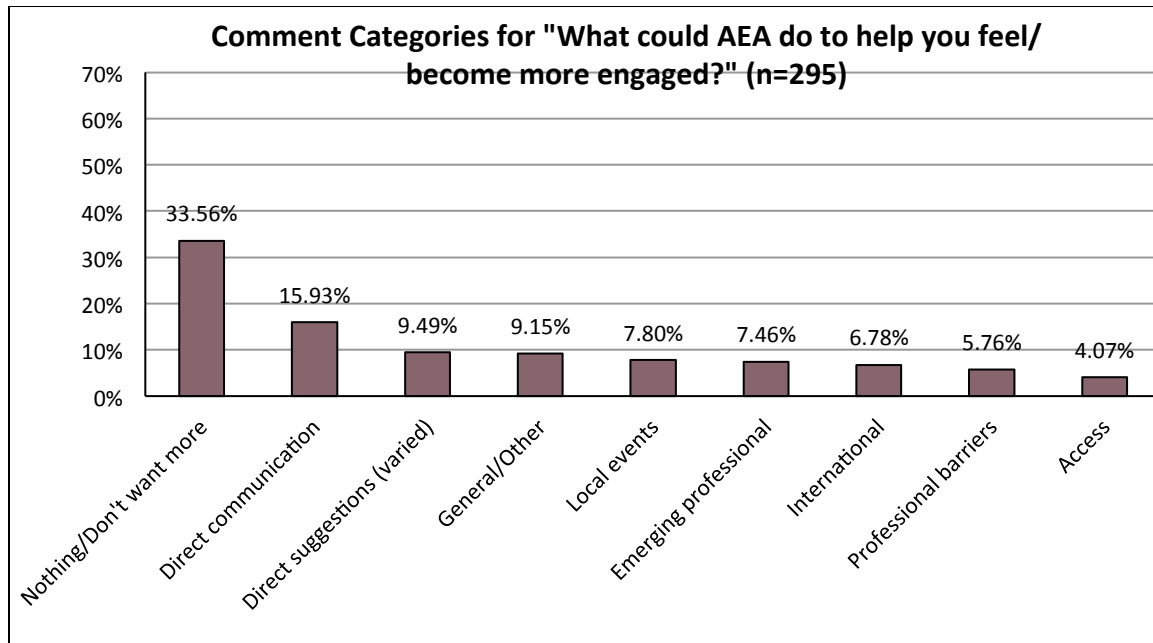
Figure 12. Comment Categories for "Please explain why your engagement level has changed?"



In reviewing the comments related to engagement changes, it is clear that members have a combination of personal and AEA-related reasons for changing their engagement levels. It is not possible to separate transition-based AEA reasons for engagement changes from non-transition-based AEA related reasons.

Another survey question asked members if they would like to be more involved with AEA. Members were allowed to choose "yes," "no," or "maybe—but not at this time." Over one-half (58.6%, n=292) indicated that they were not interested in becoming more involved with AEA at this time, with 11.6% (n=58) choosing the "no" option, and 47% (n=234) choosing the "maybe—but not at this time" option. Of members who chose the "no" or "maybe" option, all (n=292) provided a comment to the follow-up question of "What could AEA do to help you feel/become more involved?" Categorization of these comments (see Figure 13, below; categorized comments in Appendix F) suggests that one out of three members do not wish to be engaged further (33.6%, n=99). Just over 15% of members who provided a comment (15.9%, n=47), want an increase in direct communication or want communication efforts to continue. Upon reviewing these comments (see Appendix F), it's clear that some members are not sure what opportunities are available to them, and feel that more direct communication may help them engage with AEA. The remaining categories all saw less than 10% representation and include direct suggestions and other comments that did not fit cleanly into another category (9.5% and 9.2%, respectively), more localized events and activities for emerging professionals (7.8% and 7.5%, respectively), more of a focus on international members and a focus on breaking-down professional barriers (6.8% and 5.8%, respectively), and actions that address access to AEA (4.1%). See Appendix F for all comments organized by coded category.

Figure 13. Comment Categories for "What could AEA do to help you feel/become more engaged?"



The above results suggest that AEA has provided an observable increase in opportunities for members to become involved since 2009. However, this increase in opportunities has not led to a comparable increase in member engagement. In fact, changes in member engagement were noticeably lower than member opportunity ratings. These findings, taken with the percentage of members who do not wish to become more involved, and the sheer variety of ways members can become involved, may suggest that AEA is reaching saturation when it comes to member opportunities. However, when asked what AEA could do to help them (surveyed members) become more involved, diverse comments were given. Although there were many members who are not interested in becoming more involved, a diversity of member comments suggest that opportunities for member engagement may remain. However, many of the suggestions given by surveyed members may not be possible considering the resources of AEA (e.g., increasing direct communication or local events will undoubtedly impact AEA resources).

During the June Board Retreat, it was evident that AEA leadership was trying to take an inclusive approach to better educating the 48 attendees about AEA's policy-based governance for the purpose of more deeply engaging members and satisfying their needs for clarity about the transition. During the retreat, and through electronic/online opportunities, members were asked to review and comment on policy. The retreat included three activities related to discussing policies; however, it was unclear if the groups were supposed to re-write policies or not. A retreat attendee said, "Oops, our group fell into the trap of rewriting policy." At one point the facilitator said that the board wanted member engagement on policy development/revision and another time he said, "You all don't write policy." This comment may have meant that the board will take the input generated from these activities to finalize

decision-making about the policy language, but this was not clear. During the second day of the retreat, a participant openly mused about it still being unclear if participants were allowed to suggest language changes to the policies or not. After the second activity on day one, the facilitator, Policy Governance expert Michael Quinn Patton, said, "You lived through this activity and learned more than you would have by simply sitting down to write policy." It was unclear if this meant that the activity was simply an exercise or if it was both an exercise and a method for gathering input. It seemed to be the latter, yet no one collected all of the information presented by the small groups. If it was collected, JVA was not provided this documentation.

***Key informants were also asked about member opportunities, and there was not consensus on the effect policy-based governance has had on opportunities for member inclusion, with key informants feeling that it has increased (12 informants), decreased (largely due to loss of PATs; 7 informants), and stayed about the same (4 informants). In addition, some key informants feel that there has been a qualitative shift in opportunities as engagement moves from the committees to the web (4 informants). Finally, many key informants feel that members are not very interested in becoming more engaged (3 informants). Upon reviewing the comments, it is clear that the differences in some key informants' responses to this question had to do with their interpretation of what constitutes member opportunity.***

#### **A. Increased Opportunities**

*"My impression is that there has been a great expansion of member opportunities, and volunteer opportunities... Opportunities for engagement have mushroomed in [the] operations area. I think that was needed, instead of so much member involvement on committees. Previously, committees were appointed by the incoming president, and the committees were the main way to get involved, and in some ways that was restricted to people that the president knew. The model has really opened opportunities to those that were not connected to those already involved"*

*"I do believe there are many more opportunities for member engagement. Among some of the board there were concerns that this would limit member engagement, but it has increased. Much of this has been from the operational side"*

*"This model offers many more opportunities for member engagement than the previous models....it's not that the previous model was an elite model, but it formed from who people knew"*

*"There have been an enhanced number and range of opportunities...and broad types of thinking about how members can be involved"*

*"In order to get to the level of being active in our committees was [prior to the transition] to know someone. The presidents have appointed almost every one on committees. Inevitably it came down to who knows whom. It was a fundamental challenge [but no longer is]"*

*"There's no question that there are more opportunities to engage. By any objective measure there is more, but it's not of the same type"*

*"Now if you look at the membership as a whole, the opportunity for input on policies, proposed statements, has absolutely increased. There's no way to interpret it but increased volume in opportunity"*

*"I am seeing more new names leading coffee breaks [webinars] and writing blogs. It used to be that we had a group of people who were well known that were sort of dominating. Now, it's a lot of new people, too"*

### **B. Decreased opportunities**

*"I am concerned about how an elimination of PATs and committees may reduce member engagement"*

*"I think there are fewer ways to get involved. Committees are a natural way to get noticed by people and I think there needs to be a formal way to do this. We need to help people participate more"*

*"I believe it's become more top-down. I believe there was more direct input from the membership and committee before the transition"*

*"This whole transition was about policy development. It was about reducing the direct input of the members into policy development. That was the goal. At one point, individual members could actually share their ideas and feedback....this changed after the transition"*

*"I don't doubt the sincerity of member engagement, but I think they have been sold a bill of goods"*

### **C. Opportunities stayed the same**

*"That's hard to say...people will engage no matter what...."*

*"I don't see a one-to-one correlation between change in member opportunity and the transition. I think it's something we need to do more [engage members]"*

*"As a whole, you don't see the impact on the membership or membership engagement [as a result of PBG]"*

*"Here's the theory the way it was intended to work: Before AEA used to be an old boy/old girl network. If you wanted a position in leadership, you had to be part of someone who was already strong in leadership. It was difficult for outsiders to come in...With the new governance policy framework, I believe that some of that was supposed to go away and enable other members to come in and take part—especially those who never had opportunities and wanted opportunities to contribute. I want to believe that was the theory that prompted it all. Since the change to PBG, have I perceived a change in this area? No"*

### **D. Qualitative shift**

*"You can get tired of the online stuff [related to member engagement] pretty fast. Really engaging is different"*

*"I think there is some false inclusion...To me having my name on a listserv is not really what I consider member engagement. The tried and true pathways were uprooted unnecessarily"*

*"The AMC is engaging with members through Webinars, blog posts and AEA 365. This is rewarding, yet not engagement that builds leadership"*

*"While some of the old ways are going away, there are also new things being developed. The question is if the new ways of engaging members is better or not"*

### **E. Not interested in being more engaged**

*"A lot of people, including myself, just want to go to the conference and have faith that the board is doing what they need to do"*

*"But we need to have realistic expectations of who wants to get involved versus a more passive role"*

*"[The board] talks a lot about this, but at least through my lens, there are a lot [of members] that don't want that much involvement. There are those that want to learn new things and keep abreast, and make connections, and make it about professional development, but don't want to be involved. From my limited window, those that want get involved, they will find a way"*

### Member Diversity and Inclusion

One of the main goals for increasing member opportunities (and engagement in these opportunities; discussed above) was to increase member diversity and inclusion. An additional three items were included on the survey to address the perceived change in this construct since the transition began (see Figures 14, 15, and 16 below). Specifically, items asked members if they have noticed changes in AEA governance being fair, equitable and representative since 2009. Members could respond on a five-point Likert-type scale where 1=decreased a lot, 3=about the same, and 5=increased a lot. Members could also choose "not sure" or could skip these items altogether.

Figure 14. Frequency of Perceived Change in Fairness (processes free from bias) Since 2009

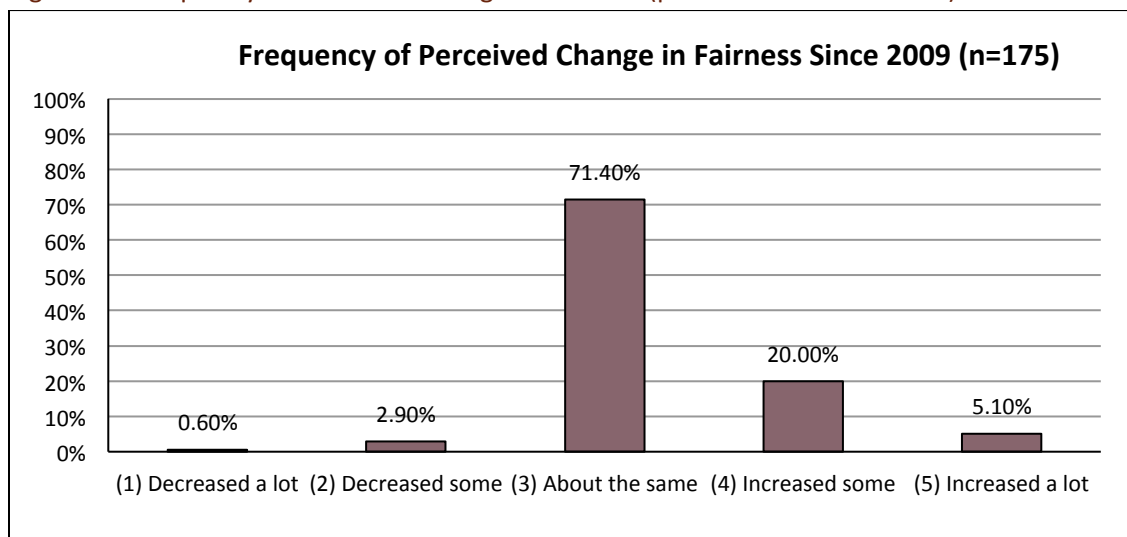




Figure 15. Frequency of Perceived Change in Being Equitable to all Members Since 2009

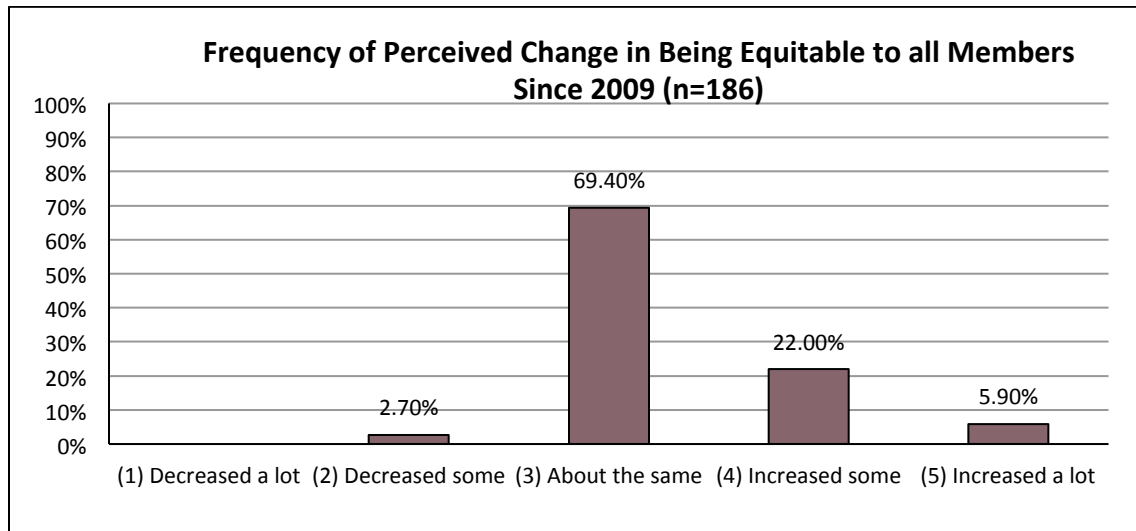
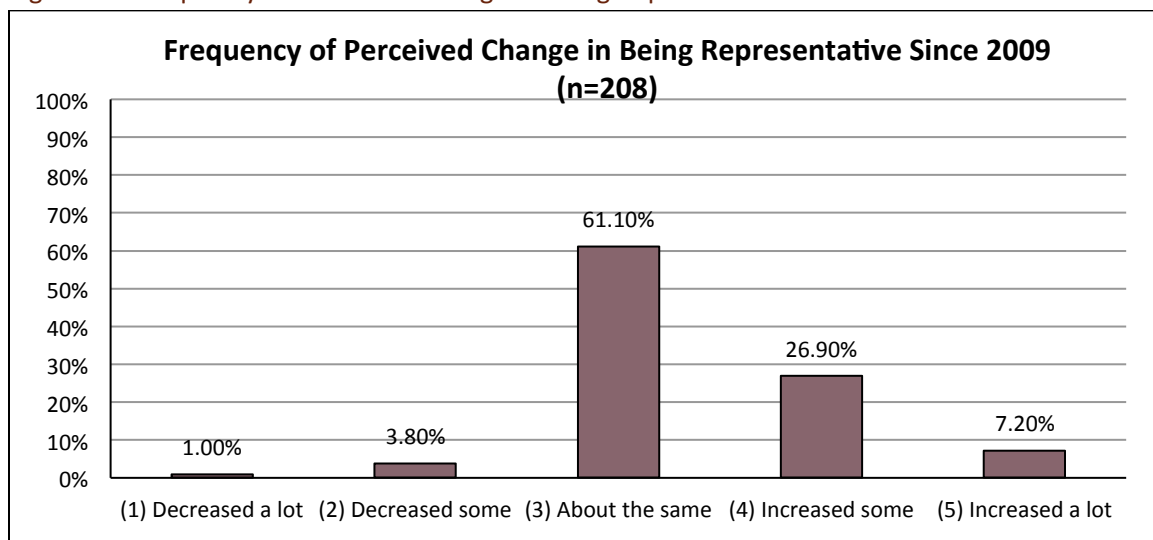


Figure 16. Frequency of Perceived Change in Being Representative Since 2009



Ratings on all three items suggest that members perceived slight increases in AEA governance being fair, equitable and representative, since 2009. This lack of robust change, once again, may be partially attributable to the members perceiving high diversity already, with current governance ratings for “fair,” “equitable,” and “representative,” being rated positively by members ( $M_s = 3.82, 3.74, \text{ and } 3.64$ ; see Table 1). This sentiment of AEA already being a diverse organization is further represented in key informant comments below.

Key informants were specifically asked if the transition to policy-based governance has impacted member diversity. Analysis of key informants responses to this question suggest that many informants (7 informants) feel policy-based governance has not impacted member diversity. However, two informants did suggest that AEA has become more diverse, although maybe not because of the transition specifically. Upon reviewing the comments further, this lack of

perceived change may be due to a ceiling effect in which informants perceived member diversity as being high prior to the transition.

#### **A. Diversity about the same**

*"The understanding is that [diversity] has been at a consistent level of high diversity. There's always been and continues to be good diversity in member participating activities"*

*"NO...I don't think there it has been impacted [In response to the extent to which PBG has impacted diversity]"*

*"I have always believed that AEA is one of the best organizations committed to diversity. If I see that all whites were elected it's because the minorities are in a smaller proportion"*

*"Certainly not in terms of race and diversity [In response to the extent to which PBG had impacted diversity]"*

#### **B. More diversity**

*"I think [PBG] has opened up more opportunities for diversity"*

*"I think we are looking for new ways to engage people from diverse backgrounds. I think we have realized an uptick [in diversity]"*

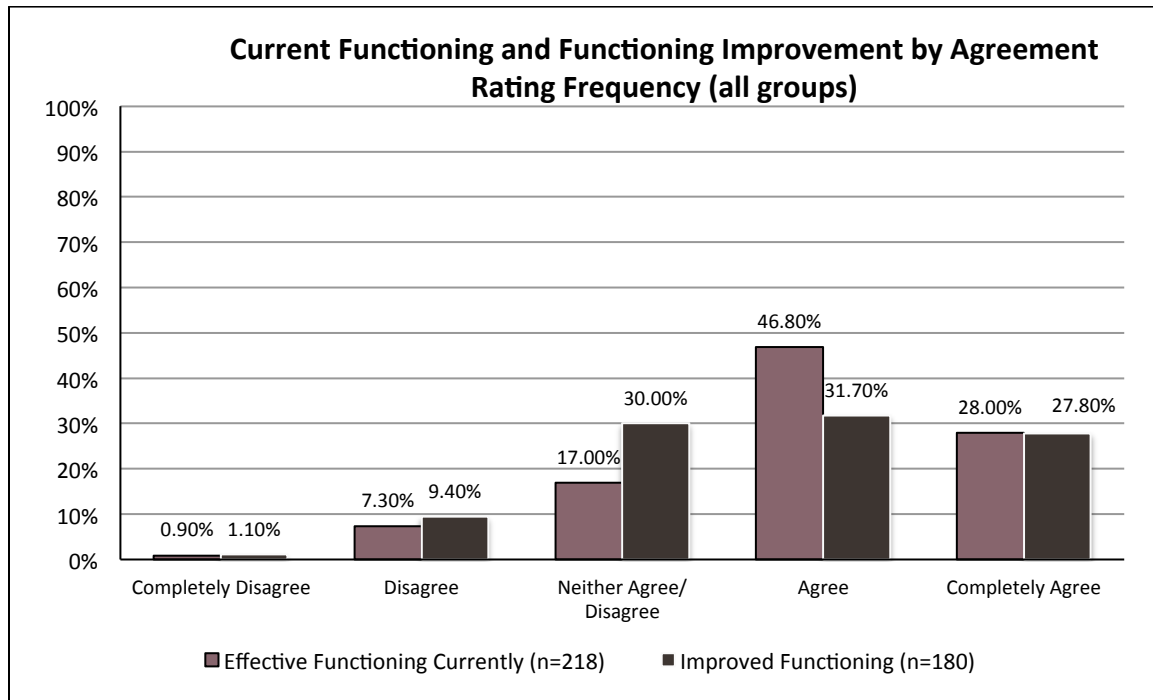
Considering member ratings and key informant responses, it appears that AEA perceives itself as a diverse organization. Adding to this the diversity of professionals at the governance retreat, it seems that lack of change on this dimension is most likely due to AEA's sensitivity to diversity before the transition began. Moving forward, however, AEA should continue to expand its definition of diversity, as other disparities may exist (e.g., diversity of professional fields, diversity of experience, etc.).

### **Functioning of Committees/Priority Area Teams (PATs), Task Forces, Working Groups**

In the member survey, this item was primarily measured using data from the ratings of specific AEA groups, as opposed to general governance ratings. As a reminder, the group participation section allowed AEA members to provide ratings of a specific AEA group they were involved with in the past five years. Due to the smaller sample size of individual groups, group-level ratings were first combined to determine overall ratings versus those for individual groups. In regards to the functioning of specific AEA groups, members could provide two ratings. The stem of each item included the wording, "please rate the extent the group...", with the first survey item stating, "is functioning effectively" and the second reading, "has improved functioning since you joined." Members could provide ratings using a five-point Likert-type scale (where 1= completely disagree and 5=completely agree). Mean ratings on both of these items indicate that there is moderate agreement that AEA groups are functioning effectively (M=3.94, SD=.91, n=218) and have improved functioning since the members surveyed joined (M=3.76, SD=1.00, n=180).

Looking beyond the mean ratings for these two items, frequencies of each particular combined rating (i.e., 1–5 on a Likert-type scale) provide further evidence that a majority of members answering these questions agree with both items. For the current functioning statement, 74.77% (n=163) chose either “agree”(n=102) or “completely agree”(n=61) as their response. For the improved functioning since joining statement, 59.44% (n=107) chose either “agree” (n=57) or “completely agree” (n=50) as their response (see Figure 17).

Figure 17. Current Functioning Improvement by Agreement Rating Frequency



Reviewing Figure 17 does not provide the full picture of the functioning of the various AEA groups. As was discussed at the beginning of the analysis, ratings of certain groups were not equally balanced. For example, 151 members provided ratings in reference to their involvement on a TIG, whereas only 12 members did so for their involvement on a PAT. This distinction is especially relevant, as the structure and functioning of the PATs were most heavily impacted by the transition when compared to other non-Board involvement. When breaking the “effective functioning” and “improved functioning” items into the group most heavily impacted by transition (i.e., Board and PATs), a similar trend emerges for current Board members, but not for those involved with the PATs (see Figures 18 and 19, below). It is clear that members who were involved with the PATs somewhat disagree that functioning has improved and that functioning is currently effective. This is not surprising considering the alteration to the PATs that occurred as a direct result of the transition to policy-based governance.

Figure 18. Current Functioning and Functioning Improvement by Agreement Rating Frequency for Board

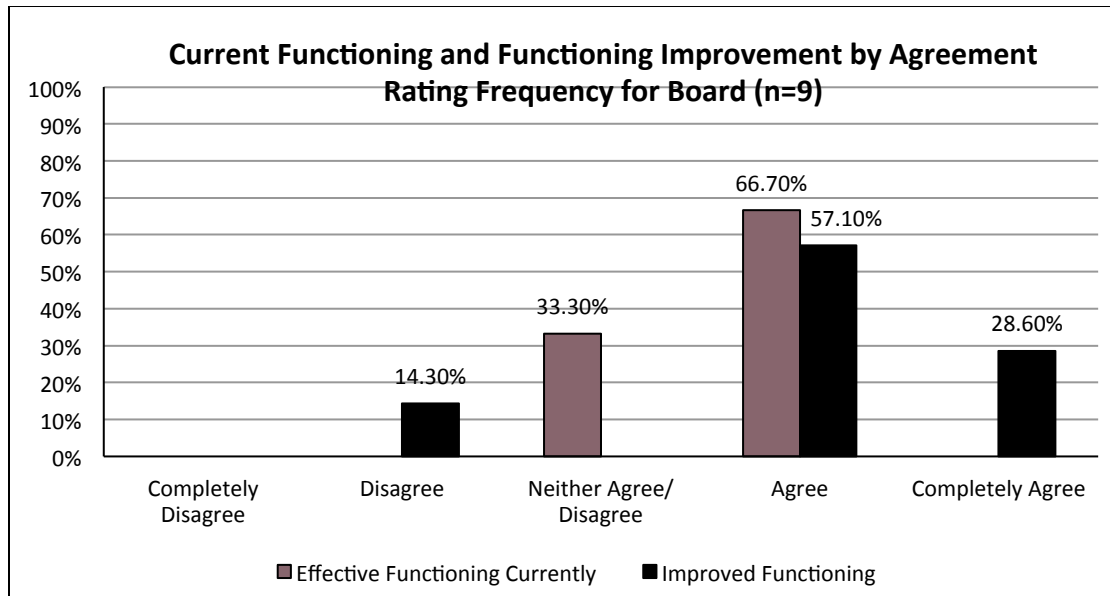
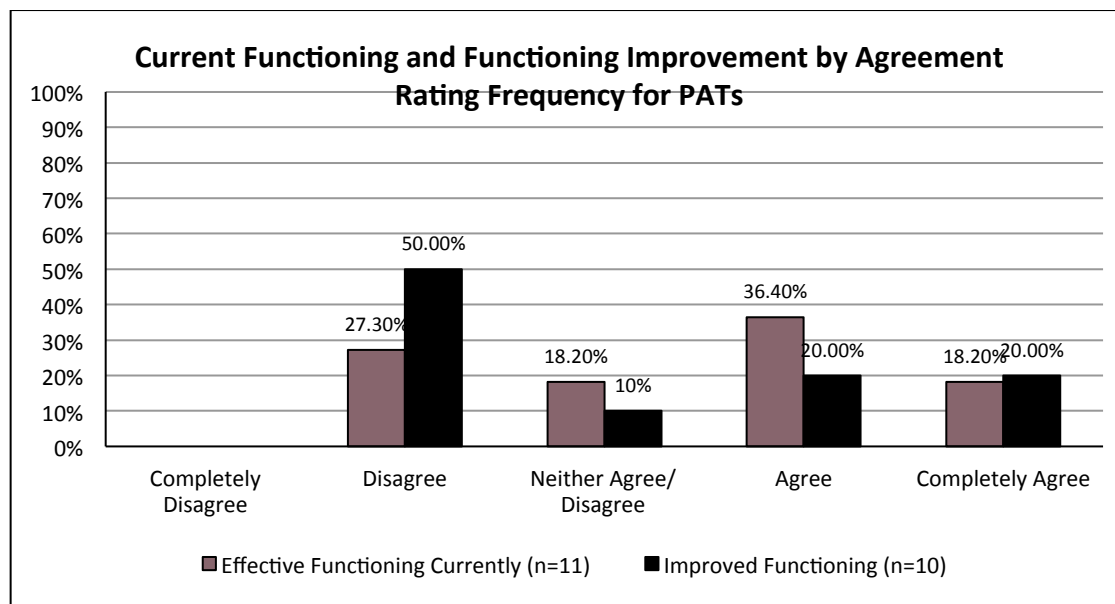


Figure 19. Current Functioning and Functioning Improvement by Agreement Rating Frequency for PATs



In addition to the above, interviews with key informants provided insight into the functioning of underrepresented survey groups. Specifically, key informants tended to focus on the functioning of the PATs. The interview questions were designed to allow key informants to speak about the functioning of AEA in general, then provided several follow-up probes focusing in on specific AEA groups (i.e., PATs, TIGs, Task Forces and Local Affiliates). Although the interview question provided a clear structure for responding, most key informants focused on the functioning of the PATs. Upon reviewing key informant responses, it is clear that the governance transition had

a strong impact on the PATs. The emergent themes on this particular question include a primary theme of there being realization that it was difficult transition for the PATs. Sub-themes include issues around changing forms (i.e., structure), insufficient communication, a lack of direct link to the Board, and a dilution of input.

***Acknowledgement that the transition to policy-based governance was a difficult time for the PATs and a sense of not being sure how to proceed (11 informants).***

*"...it's been tough to be on the PATS. They are a transitional [sic] mechanism. It was probably hard for them to figure out what to do. We could have done it better. It's a short-term causality...they were impacted negatively. It was hard for them to do anything of substance and meaning"*

*"There's a big issue, what we do with the PATs? It will be critical about how this evolves. Certainly the group I am working with is not satisfied"*

***Some key informants thought that the constantly changing form and structure of the PATs created a sense of confusion. Issues included a perception that the Board was making exceptions, and a lack of clarity regarding expectations (3 informants).***

*"[The board] would modify [the PATs] and then make an exception. That pattern played out multiple times"*

*"[The board] had disruptions, and lack of clarity regarding expectations. It was a difficult time..."*

*"There was a problem because there was morphing, morphing, morphing and PAT leaders were confused"*

***Lack of communication was another theme that developed throughout the interviews. Two key informants felt that communication could have been better than it was, and felt that lack of communication caused anxiety and other negative responses to the transition.***

*"[PAT] appointees felt that they were not kept in the loop"*

*"The communication around [the PATs] created a lot of anxiety. The board didn't have a very decisive process for figuring out how these would function...I would describe it as pretty chaotic"*

***It appears that key informants understand the separation of the Board from PATs that is required by policy governance. However, some (3 informants) were still concerned with this separation, regardless of what AEA's policy-based governance model requires.***

*"It doesn't make sense to me that PATs and committees not have board liaisons. Whether it's right or wrong, our culture has perceived value on things and when these groups aren't connected to the board then it seems they aren't valued. I think that we should continue PATs, call them whatever you want to call them, and have them be few in numbers and be linked to the board. Otherwise they will be marginal and not have much importance"*

*"If the PATs or advisory groups don't have a link with the board, I wouldn't want to be involved. If the board doesn't have time to listen to an advisory group or a PAT, then it's not valued. If they don't have time, then I probably don't either"*

*"In my opinion, there was funneling of input. There were more people involved in decision-making because you had committee[s] report directly to the board. When they became PATs the committees were grouped, and therefore the input was diluted"*

Taken together, survey ratings and interview responses present a variable picture as to whether or not functioning has been increased because of the transition. Upon combining group ratings of current functioning and functioning improvement, it appears that functioning is at a moderately high level currently, and has been improving. However, these results are tempered somewhat by the comments received from some key informants. Considering both survey responses and key informant comments, it appears that although functioning has improved, there is still a good deal of work to be done in this arena, particularly to address what will be done with the PATs. This is not surprising, as the PATs (beyond the Board itself) have been the most heavily impacted by the transition.

### **Association Management Company (AMC) Resources**

Key informant responses were mixed, as the respondent felt that increased resources (i.e., AMC time) were being spent on some groups, but other groups were using fewer AMC resources. For example, time being spent with PAT-related work is consuming less AMC time. This was attributed to the fact that the PATs "are disappearing." Alternatively, the amount of time the AMC staff spends with Task Forces has increased since the transition, with resources being spent with the TIGs staying the same. The interviewee could not clearly attribute the changes to the transition, but simply stated how they have changed since the transition. This distinction was made several times throughout the interview.

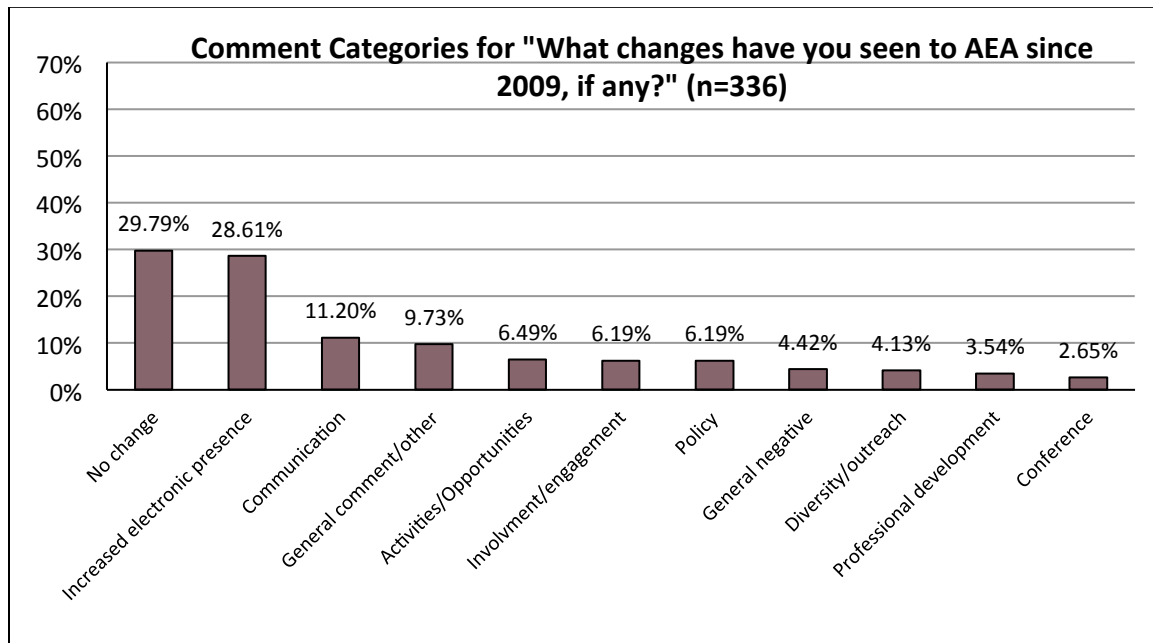
The responses to this question are not surprising, as they mirror what has happened to the structure of the various groups since the transition to policy-based governance began, with fewer PATs, an increase in the number of Board-appointed working groups, and TIGs being largely unaffected. It is hard to determine from the data herein if a clear conclusion can be reached as to whether there has been a net gain or loss in the resources the AMC spends, or the degree to which changes can be accounted for by the transition alone.

### **Other Changes Observed by Members**

In addition to the evaluation focusing on specific changes related to the transition to policy-based governance highlighted above, surveyed members were asked "What changes to AEA have you noticed since 2009, if any?" Members who joined after 2009 were reminded to use the year they joined as a reference point. In total, member comments fell into 11 categories, with 336 members commenting (see Figure 20 below, and Appendix G for coded comments). Close to one-third (29.8%, n=100) of members commented that they felt there was no change. An almost equal number of members (28.6%, n=96) mentioned an increase in electronic/online presence from AEA. Remaining comments saw less than 12% representation, and included changes in communication (11.2%), activities and/or opportunities (6.5%), involvement/engagement (6.2%), policy (6.2%), diversity/outreach (4.1%), professional development activities (3.5%), and conference-related comments (2.7%). Note that percentages

sum to greater than 100 as some member statements were included in multiple categories (see Figure 20).

Figure 20. Comment Categories for "What changes have you seen to AEA since 2009, if any?"



### Positive and Negative Unintended Outcomes (and other emerging information)

Since members taking the survey were not very knowledgeable about the transition, it is difficult to attribute positive or negative survey results directly to the transition. However, the member survey did include a series of survey items to address basic perceptions of and satisfaction with AEA (see Table 5). As can be seen by reviewing Table 5, when asked to rate a series of general AEA perception items (using a five point Likert-type scale, where 1=completely disagree and 5=completely agree), members seem to be quite satisfied and have positive perceptions of other dimensions of AEA. Even for the lowest rated item (i.e., having access to AEA leaders), over one-half of members responding to this item (59.4%, n=224) stated they either "agree" (n=135) or "completely agree" (n=89) that they have access to AEA leaders. Only 10.6% (n=40) stated that they "disagree" (n=31) or "completely disagree" (n=9) with this lowest rated item. Higher mean rating items, such as "AEA offering opportunities to become involved," only saw 4.2% (n=20) members give a rating of "disagree" (n=15) or "completely disagree" (n=5).

Table 5. Member Agreement Ratings on a Series of General AEA Perception Items

	<i>M</i>	<i>SD</i>
AEA has been changing for the better	3.83	0.76
AEA offers opportunities to become involved	4.24	0.77
AEA is an accessible organization	4.15	0.76
AEA is responsive to members	4.03	0.78
I am satisfied with AEA	4.17	0.77

I have access to AEA leaders	3.7	0.97
I see my interests reflected in AEA	3.92	0.88
I am satisfied with how AEA is organized	3.93	0.76
I would say AEA is a diverse organization	3.93	0.87

Note: Sample size ranged from 380 to 480 and did not include members who joined within the last year. All items were rated on a 5-point Likert-type scale where 1=completely disagree and 5=completely agree. Scores above 3 indicate a positive response (i.e., a response in-line with governance expectations).

In addition to the above, members could indicate if their general satisfaction with AEA has changed since 2009. Members could indicate an increase or decrease using a five-point Likert-type scale (where 1=decreased significantly), 3=about the same and 5=increased significantly). Although close to one-half of members (43.6%, n=194) felt that there has been an increase in their satisfaction since 2009, a greater amount felt that their satisfaction is about the same when compared to 2009 (50.3%, n=224).

Although there are some indications that that both member satisfaction and positive perceptions of AEA overall have improved since 2009, this cannot be clearly attributed to the transition alone. In addition, some informant comments include issues that are less positive (or are simply informative). Comments presented below include those related to the process of the transition (and not the model itself), communication and issues related to member diversity.

***Some issues AEA is struggling with related to the policy-based governance model, which are not elements of the model itself include: (a) poor execution of the model (3 informants), (b) a lack of understanding the model (1 informant), (c) an overemphasis on policy-based governance language and technicalities (1 informant), (d) unrealistic expectations for what the model could provide (1 informant), and (e) a lack of strategy despite the new emphasis on policy (3 informants). Below are comments related to each of these issues:***

***(a)*** “Our policies are very broad. So it’s getting to the next level that is needed...I was expecting things to get more explicit. Its [sic] been a lack of progression....a lot of the anxiety is because it’s taking a long time to get from general PBG to what it means from a practical perspective. I know this needs to evolve”

***(b)*** “I think there needs to be a clearer understanding. I think it’s still quite a mess. I would describe it as a decision that has not yet born fruit. For PBG to be successful, the model needs to be deeply understood by board members—not just someone who tells them the short version”

***(c)*** “I guess my thing would be to dampen this whole emphasis of language of PBG governance. This constant reference to PBG can be a detriment”

***(d)*** “People acted like it was some new revolutionary thing and it was over-hyped, and this caused some of the problems and some of the reactions. I think if was handled differently we would not have had some of the issues”

***(e)*** “We have made great strides on getting policies in place and making clear what these policies are, but there is still a lot of things that need to be done to get more strategic”



***A second theme that developed during the key informant interview deals with individuals who are upset about the transition itself, as opposed to the PBG model specifically. In particular, some are upset by the way the transition was handled and the things that “fell through the cracks” during the transition (8 informants).***

*“I think we managed to draw out the pain [of the transition]. There are a number of things that could have been done differently”*

*“I am critical about the way in which we went about policy-based governance, yet I am not critical about policy-based governance because I think this is the way we should go”*

*“Hindsight is 20/20 and there are things we could have done better”*

*“[The transition has] been a tedious and bumpy process”*

*“I’m not quite sure if the transition [to PBG] has been managed in an efficient way”*

*“I thought PBG was good idea, it was the way in which it was done [that was the problem]”*

*“[The transition to PBG] was kind of uncoordinated and haphazard”*

***Another theme inherent throughout the key informant interviews was the issue of communication (4 informants). This is especially true in regards to what impeded, or was a barrier to the transition. Although the transition occurred over three years ago, it seems poor communication continues to be an issue presently.***

*“So that is always going to be the challenge, to make sure that those that want to know are being reached in ways that meet their communication needs. I think this is crucial, but I also think it’s okay that they are not always [going to reach people]... we can do better, but we’re never going to reach everyone”*

*“Communication, communication, communication” (This quote was in response to the question: “What factors are impeding the transition”)*

*“I think three years into it, things should be clearer then they are”*

### **Policy-Governance / AEA Fit**

Although this question was not asked directly of key informants to determine some of the existing opinions to this item, and members seem to be moderately satisfied with AEA (and are mostly unaware of the governance shift), there are some data that may provide a “first step” in making this determination. When this information is considered in conjunction with the recommendations that appear in the next section, some clear distinctions emerge as to how the current state of AEA governance and the policy-based governance model are fitting the needs of the organization.

One hundred and twenty-six individuals provided feedback to answer the question, “what suggestions do you have for improving AEA’s governance.” See Appendix H for comments. Many individuals (24.60%, n=31) indicated that they did not have enough knowledge of the

governance to provide any feedback. Quite a few (13.49%, n=17) people also indicated they were satisfied with the current governance, and some expressed specifically what they appreciated about AEA: “what I do admire is the information sharing—the tips, the journals and a very well run conference...and learning and wanting to learn more about how AEA is so efficiently run.” While many respondents had positive feedback, or no feedback, many also offered suggestions for areas of improvement. These suggestions can be grouped in the following thematic areas:

**Inclusiveness.** Many of the comments (21.43%, n=27) pertained to various forms of inclusiveness.

- **“Little fish.”** Some respondents (7.94%, n=10) felt that the organization was “closed” to less well-known evaluators who were not affiliated with prestigious research organizations such as universities. As one respondent put it, “be more mindful of the differences in roles and contributions of the ‘big fish’ versus the ‘little fish’ in the evaluation pond. The needs of us small evaluation houses may be more practical and less theoretical than universities that have evaluation centers and phalanxes of grad students.”
- **New leadership.** Some respondents (6.35%, n=8) indicated that they would like to see the opportunity for new leadership at the board level and, “find ways to allow members, including early professionals, to get more involved in governance and leadership.”
- **International inclusiveness.** A group of respondents (5.56%, n=7) felt that the organization is very focused on the needs of researchers in the U.S., and think the organization would benefit from increased emphasis on unique international needs. In the words of one respondent, “AEA should think about the members outside of the United States...I take it that we operate in different environments and cultures and therefore the Association should look at means of having representation from this part of the world, by that way it will enhance effectiveness and reflect an image of global organization.”
- **Diverse ideas.** “Permit, don’t discourage, healthy discussion and critique. Don’t stifle conflicting views.” This sentiment was reflected by a handful of respondents (23.02%, n=29) who felt the organization would benefit from being more open to ideas that diverge from the “norm.”

**Transparency.** Quite a few respondents (23.02%, n=29) recommended that AEA increase its level of transparency about governance issues, and provide more information about the topic to members and make the information easily accessible. Comments included, “educate the members more about how it is governed and the recent changes...What is policy-based governance? What was in place before? Why was this change made?” and “provide all members with a one pager on AEA structure and governance and dedicated web pages for more detail.”

**Other topics.** Other topics that were addressed by more than one individual, and are worthy to note, but did not receive the same treatment by respondents, include the following theme areas:

- **Outreach.** A few respondents (3.97%, n=5) indicated there should be a stronger connection between AEA leadership and general members through outreach activities. In the words of one respondent, “come out from behind all the surveys and talk to us worker bees...maybe they could reach out in sessions and engage others of us as partners [rather than audience members].”
- **Interdisciplinary work.** A small group of respondents (5.56%, n=7) indicated that they wanted to see an increased level of collaboration among professionals in different disciplines as well as increased connections between individuals within the organization: “better strategic linkage with other professional associations,” and “invite in thought leaders from other fields to engage in the leadership of AEA.”
- **Governance models.** A few respondents (5.56%, n=7) commented on the current governance model. Some comments were critical of the selection of the Carver Model: “It [AEA] adopted the Carver Model despite the considerable literature on its problems within the not-for-profit sectors.” Others were less critical but indicated that the governance model should still be addressed: “If you are moving to a [Policy Governance] Model an org like AEA should use [other models] in a year long process.”

***Other key informant comments not cleanly fitting into previous categories suggest that key informants feel that the model is a good fit for AEA, or at the very least, is a positive direction for AEA to consider. Positive comments thought to be a result of policy-based governance include (a) an increase in the clarity of the ED's role (4 informants) and (b) an orientating effect on AEA (3 informants). Other comments (C) include those that suggest an increased flexibility due to leaner bylaws and a shift from personalities to positions.***

**(a)** *“Clarity around Susan's role has been increased [as a result of PBG]”*

*“...having worked closely with Susan has clarified her role...She's been given the flexibility she needs”*

*“To get out of [Susan's] way has been a major accomplishment. It was clear to me that Susan Kistler really knew what she was doing”*

*“In a way we had amateur cooks giving instruction to a master chef. Now we have professionals really being in the kitchen. It's good for the board to set the menu and interact with the chef [the ED]”*

*“The onus is on the board to determine what the AMC needs to do and policy-based governance gives the AMC a clear set of marching orders. It also gives the AMC flexibility to address the policies in the way it see fit. It means you don't have board members micromanaging the operations side and the management side is given flexibility and feedback”*

*“[Policy-based governance provides] the Executive Director guidance without letting micromanagement”*

*“Boards of large corporations delegate to the executive and trust that person. I think that AEA now has the structure for this level of sophistication”*

**(B)** *“The operational activities are now in service to the policies....I think even in this short time period, this has been positive and a orientating framework”*

*“It [PBG] serves as a framework for moving forward on the same path”*

*"The transition to PBG allowed us to be less reactive and more proactive"*

**(C)** *"One of the things that was a real problem [prior to the transition] is that we had our organization structure written into our bylaws. So to change our committee structure, we had to go to our full membership to change that structure. So now what we have is a lean set of bylaws. Now the board can adapt and change rapidly to groups that may be needed and groups that aren't doing well can be disbanded. There's both public accountability and adaptation"*

*"I think many years prior, whatever the president wanted, we did. Which was bad sometimes. I think now, there is a clear expectation that the new president know[s] about the stream of thinking and what's going on"*

**There were some negative outcomes thought to be a result of policy-based governance. These centered around the changes to organizational structure including (a) an "excessive" shift of power and responsibility to the Executive Director (4 informants), (b) the loss of the value committees provided without a suitable replacement (2 informants), and (c) the loss of sufficient fiduciary oversight (2 informants).**

**(a)** *"[A negative consequence of PBG was that] the operation would be delegated too much to the AMC. Concerns that the AMC would be too empowered to carry out day-to-day responsibilities. There were some concerns because there were issues that seemed to be sort of gray areas. Is this policy? Is this operation? Is it both? If it is both, who should handle it?"*

*"By removing the PATs or standing committees and having the board only focus on policy, we are putting everything in the hands of the AMC. Eventually we are losing our knowledge and we will be at the mercy of the outside entity running the show. Even with a good AMC, they have all the knowledge and there is concern about long-term sustainability of the organization. If she gets hit by a bus, then we are stuck. If we have abandoned the committees or PATs, we won't know how to run the organization. We need to know about the operation of the association"*

*"In a sense the Executive Director became the czar. The board activity shifted the power [to] the Executive Director... the Executive Director has too much power. If a board creates a policy then everything after that, it's the implementation of the policy that shapes what the policy does...and that was given to the Executive Director"*

*"I am somewhat disillusioned about parceling out so much to the AMC"*

**(b)** *"No one has convinced me about why we need to get rid of the PATs or committees...What was so bad about the committees? We don't know. Every system has some good examples and some bad examples. I don't think we have to totally abandon those committees"*

*"It was not clear to me what the criticism of the committees was. Some committees were more active than others. These things wax and wane. The structure has now been swept [away] and I find that to be risky"*

*"I understand that [the board doesn't] want the board to drown in minutia, but to swing over to sweep standing committees and segregate off the system of who is doing what work and to cut line of accountability to the Board, is problematic"*

**(c)** *"In a pure policy-based governance structure, as I understand it, there is little place for a treasurer because it is too operationally based..."*

*"I think that maybe to some degree folks have gotten carried away and forgot this thing about fiduciary responsibility. It doesn't matter how much [the Board] delegates out to the AMC. By just discussing policy-based governance issues in the abstract is not going to be sufficient in fulfilling the fiduciary oversight"*

Taking the above member comments in addition to weighing the positive and negative emerging key informant comments above, it seems that AEA's interpretation of Carver's Policy Governance is fitting the needs of AEA. This seems especially true when considering the direct questions asked throughout this evaluation and the themes and comments that emerged (see Appendix I for other relevant, but uncategorized, comments). Upon reviewing the data, it appears that there are other issues, beyond the model itself (again, see Appendix I), which brought about resistance and negativity to the model. In fact, some of the strongest critics interviewed stated that they agreed with the model, but not the process that guided the transition. With continued education about the model, specific model-related factors (e.g., defining strategy), and a continued focus on communication, the transition should continue to unfold to better meet the needs of AEA. A key informant interview comment reflected this need to keep moving forward, and acknowledged that there is more work to be done, by stating the following:

*"A lot of people have been involved in AEA for years and it's their professional home. They feel like their professional home has closed the door on them. All of these groups have made substantial contributions to AEA. I know they want to continue and have a voice. They want to know that their work is valued. I think the board has made a good attempt to actualize these groups' feelings, but I think there is still quite a bit of work to be done"*

## Conclusions

In general, data obtained throughout this evaluation suggest that AEA's transition to policy-based governance has not led to extremely negative outcomes. In fact, for most data collected, outcomes suggest that members feel positive toward the current state of governance. Upon reviewing general governance items (i.e., ratings of transparency, fair, equitable, representative, accountable), and group-level ratings (e.g., has effective leadership; is performing its role well; etc.) this is clearly seen. That is, all 10 general-governance items rated (using mean ratings) and most group-level ratings are above the neutral point on the scale used, indicating a high degree of positive perceptions among AEA members. Conclusions by major evaluation theme are presented below, followed by a detailed recommendation section.

**Mostly positive group-level ratings.** As with any evaluation that utilizes scale ratings, this evaluation found important *relative* score differences that should be noted. For example, when looking at group-level ratings for those involved with the Board, it appears that members feel that the Board has been improving its functioning (i.e., ratings for the item “[the Board] has improved functioning since you joined” was among the highest for Board ratings), but may still need to work on creating procedures that members understand (i.e., ratings for the item “[the Board] has procedures the general AEA members understand” were relatively low for Board ratings).

Ratings from those involved with PATs show a similar pattern, with the procedures item (i.e., [PATs] have “procedures that general AEA members understand”) scoring the lowest. In fact, this “procedure understanding” item for PATs was one of the lowest-rated items in the entire survey. Also of note is the fact that 50% of PAT members responding disagreed with the statement that PATs had “improved functioning since you joined.” At least some of the lower ratings on the score may be attributable to the change that the PATs have undergone since the transition. Supporting this conclusion is data from other sources. For example, both the retreat notes and the documents AEA provided (and key informant interviews) showed that the change in PAT structure created a sense of confusion for those involved.

**Shift towards a strategic orientation and away from operations.** Results from the member survey suggest that members currently perceive the governance of AEA to be strategic. Ratings for being “strategic,” which was defined as “deliberate in goals and plans,” was the highest rated item among the governance perception items. In addition, data support the notion that the members have perceived an increase in strategic focus within AEA since the governance transition began (i.e., in 2009). This conclusion is further supported by interview data in which key informants indicated that they saw a shift away from operations.

**Shift related to continuity in strategic planning and direction of Board initiatives is lower in relation to other governance factors measured.** Data from members (both surveyed and interviewed) suggest that this objective of the governance transition has not been achieved as strongly as some of the others evaluated. In the member survey, ratings for changes in

consistency (which was used as a proxy for continuity) since 2009 were not as notable as other items measured. In fact, a majority of members feel that consistency (i.e., continuity) has stayed about the same. Reflecting the perceived consistency change on the member survey, key informants seem to only slightly favor the notion that continuity has increased. Although members may feel that consistency has mostly stayed the same (or slightly improved), this does not necessarily mean that change is not occurring. This lack of change may also be an indication that members are not privy to witnessing how consistency (and continuity) is represented in policy-based governance.

**Shift related to Board accountability is lower in relation to other governance factors**

**measured.** As was seen with ratings and key informant comments surrounding continuity, it appears that accountability is still a work in progress. A majority of members who responded to the survey feel that accountability is about the same since 2009, with a second group of respondents favoring a slight increase. It is not clear whether this perceived lack of change is due to members simply not knowing what accountability looks like within AEA governance. Alternatively, survey responses could simply reflect that issues of accountability do not impact the larger member base. Key informants did have clear opinions on issues of accountability. However, within these opinions, there was no clear consensus as to whether accountability increased, decreased, or stayed the same.

**Governance transparency was rated moderately well, with many members feeling**

**transparency has increased.** Surveyed members perceive moderate levels of transparency in the current AEA governance structure, with the majority of members feeling transparency of AEA's governance has increased since 2009. It is impossible to determine from the survey alone why members feel there has been an increase in transparency since 2009. The increase in perceived changes since 2009 could be attributable to an increase in communication technology and reorganizing of AEA website postings, or from issues tied directly to policy-based governance. As can be seen by reviewing the above key informant themes, there is some evidence to suggest that the transition to policy-based governance positively impacted transparency. However, there was some disagreement. In general, AEA should build off of the success seen within its general efforts to be more transparent, while making a clearer distinction about what efforts can tie directly to AEA's interpretation of policy governance.

**More opportunities for member involvement.** However, an increase in member opportunities has not led to an equal increase in member engagement. Results suggest that AEA has provided an observable increase in opportunities for members to become involved in since 2009. However, this increase in opportunities has not led to a comparable increase in member engagement. In fact, changes in member engagement were noticeably lower than member opportunity ratings. These findings, taken with the percentage of members who do not wish to become more involved, and the sheer variety of ways members can become involved, may suggest that AEA is reaching saturation when it comes to member opportunities. However, when asked what AEA could do to help them (surveyed members) become more involved,



diverse comments were given. Although there were many members who are not interested in becoming more involved, a diversity of member comments suggest that opportunities for member engagement may remain. However, many of the suggestions given by surveyed members may not be possible considering the resources of AEA (e.g., increasing direct communication or local events will undoubtedly impact AEA resources). Comments from key informants further support this conclusion.

**Member diversity and inclusion has not shifted as much as other factors.** However, this lack of change may be due to AEA being perceived as a diverse organization before the transition. Considering member ratings and key informant responses, it appears that AEA perceives itself as a diverse organization. Adding to this the diversity of professionals at the governance retreat, it seems that lack of change on this dimension is most likely due to AEA's sensitivity to diversity before the transition began. Moving forward, however, AEA should continue to expand its definition of diversity, as other disparities may exist (e.g., diversity of professional fields, diversity of experience, etc.).

**Mixed results related to whether or not the governance transition improved functioning among specific AEA groups.** Taken together, survey ratings and interview responses present a variable picture as to whether or not functioning has been increased because of the transition. Upon combining group ratings of current functioning and functioning improvement, it appears that functioning is at a moderately high level currently, and has been improving. However, these results are tempered somewhat by the comments received from some key informants. Considering both survey responses and key informant comments, it appears that although functioning has improved, there is still a good deal of work to be done in this arena, particularly to address what will be done with the PATs. This is not surprising, as the PATs (beyond the Board itself) have been the most heavily impacted by the transition.

**Mixed results related to whether or not the governance transition decreased AMC resources being spent to support various AEA groups.** Although there was limited data to assess this component, it appears the governance transition simply shifted AMC resources rather than decreasing resources spent.

**Policy-based governance fits the needs of AEA.** Reviewing member comments, in addition to weighing the positive and negative emerging key informant comments, it seems that AEA's interpretation of Carver's Policy Governance is fitting the needs of AEA. This seems especially true when considering the direct questions asked throughout this evaluation and the themes and comments that emerged. Upon reviewing the data, it appears that there are other issues, beyond the model itself, which brought about resistance and negativity to the model. In fact, some of the strongest critics interviewed stated that they agreed with the model, but not the process through which the transition occurred. With continued education about the model, specific model-related factors (e.g., defining strategy), and a continued focus on communication, the transition should continue to unfold to better meet the needs of AEA.



**Positive and negative unintended outcomes.** Surveyed members seem to be satisfied with AEA currently. Although satisfaction is not a primary outcome stated by the policy-based governance model, elements of satisfaction are inherent within many of the outcomes tested. When asked openly about what changes they have seen in AEA since 2009, members' comments most often fell into categories of "no change" or "increased electronic presence/social media." In addition, there is other emerging information that may continue to impact the transition to policy-based governance. These factors are related to execution of the model, and suggest that there is too much emphasis on the technicalities of Policy Governance, a lack of a clear understanding of the model, need for clearer model definitions, and a lack of strategy (and definition of what strategy is) despite the increased emphasis on policy. Communication was another issue that emerged as a major barrier to the transition.

## Recommendations

Considering the above, the most significant remaining challenges relate to identifying a structure for varied levels of member engagement while promoting accountability and transparency. The governance transition has taken nearly 24 months, and key leaders are anxious to firm up the structure (as reflected in comments). There are two primary motivations to resolve structure-related questions. First, members who were previously engaged in committees would like to understand the long-term plan for committees, now known as PATs, and they want to figure out ways for members to engage with small groups in meaningful ways. This suggests that it is time for the AEA Board to solidify its structure and move away from focusing on "how to adapt the model" to "how can we bear the fruits of this model." With a solidified structure, the Board will be able to spend more time on other issues that are less understood (or known) to members (e.g., continuity and strategy).

Below are additional recommendations. These recommendations were developed using considerations of the data presented herein, as well as other AEA documentation, observations, and publications. In addition, JVA's internal governance expert, involved throughout the course of the project, added her own recommendations based on her involvement with the project, the data presented and her own governance expertise. While developing recommendations, evaluators framed this additional information within the findings from JVA's assessment of AEA governance.

### Board Leadership and Structure

Based on conversations with key informants, JVA understands that AEA continues to transition to policy-based governance and that the Board is working to determine whether or not to link PATs to the Board. This issue of a Board support structure appears to be highly contentious, and has been so since the beginning of the transition to policy-based governance. Some key informants expressed the importance of key groups like finance, diversity and nominations being connected directly to the Board. There is a perception that too much authority will be given to the AMC staff if these groups are linked to the AMC instead of the Board. JVA

recommends that AEA be deliberate about deciding this piece of its structure. There are intense emotions involved because some key informants believe that by completely disbanding committees and PATs, or making all of them working groups of the staff, accountability will greatly decrease. When the conversation arose about eliminating the PATs during the June Board retreat, JVA observers heard several responses from attendees that suggested disagreement with this action.

Through reviewing the different sources of data for the current project, evidence was found to suggest that AEA leaders are inconsistently using language about the PATs and committees. This is most likely due to how recently the transition occurred. However, steps can be taken to further clarify group characteristics. Naming and defining groups and business approaches may seem like a trivial issue to those intimate with the transition, yet to those who are less involved, the current lack of clarity leads to confusion. Several times throughout the key informant interviews, respondents used two different concepts or terms synonymously (e.g., PATs vs. committees; strategy vs. policy). The same challenge could be occurring with the working groups connected to the staff. JVA interviewers heard several different types of references to these groups. JVA recommends that AEA be firm and consistent in naming various sub-groups within its structure.

JVA also recommends that a visual depiction be created for AEA's website to convey the board structure, task forces, working groups, staff, etc. This will help instill greater understanding of the board, staff and volunteer structure, connections and related responsibilities. A visual "how we operate" graphic may also be of interest to members trying to become more involved with AEA, or simply trying to learn more about the organization. Upon doing this, however, AEA must remain cognizant that many informants are ready to move beyond the approach that focuses on the model's technicalities to a more global perception of AEA governance.

Although the AEA Board has decided to implement policy-based governance as compared to Carver's strict Policy Governance model, JVA recommends continued attention to the model. At the beginning of the transition there was a great deal of education for board members, and every member received a copy of Carver's book and other training-type material. However, overtime, this information may become diluted, having passed from Carver-trained Board members to new Board members who may be less familiar with the transition. This possibility was, in fact, stated by key informant familiar with Board activities. If AEA continues with policy-based governance, JVA recommends that AEA set aside funding for continuous education related to policy governance. This will promote self-education and improve some key informants' belief that "the current board hasn't even read Carver. They are only hearing about it second hand." AEA is still experiencing transition and it is therefore imperative that leaders are informed about the governance model they are trying to understand and adapt to meet the organization's needs.

In terms of Board leadership, it is worthwhile to reference Carver's distinction between ownership interest and directive interest. During the AEA retreat in June 2011 and on its

website, AEA has clearly stated that its members are the owners of AEA. Owners (i.e., members) are the public beneficiaries of AEA's work and Board members are owner representatives. It seems that past and present leaders who are especially concerned about AEA's implementation of policy-based governance are taking on too much of a direct owner interest. At the same time, they may be doing so because they believe deeply in the sustainability and continued growth of the AEA membership. Most interviewees expressed a deep commitment to AEA's mission, the board's duty of care and member engagement. Member engagement emerged as an area of focus on the member survey.

Carver does have a place for committees within his model if they are aiding in the process of governance and not management (Carver, 2006, p. 225), yet he states that committees can endanger "board wholeness" (Carver, 2006, p. 215). Following best practices in the field, the committees should each have a committee chair who is on the board, the committees should have job descriptions, and when necessary, a staff person may participate in a committee discussion. Several of AEA's PATs are functioning in this manner and in particular, the Finance PAT has a seamless working relationship with the Board and staff. Instead of doing the work of the CEO, the Finance PAT is providing a layer of accountability and direction in investments. On the other hand, it seems that certain aspects of PATs should be more closely related to the staff. The Awards PAT seems like it should be aligned directly with the Executive Director and her designees. JVA governance experts have seen hundreds of nonprofit organizations function well with committees, and the information referenced for the current evaluation offers some evidence that this structure could work. This approach could be made even more successful if some of the weaknesses uncovered by the data (e.g., poor communication) are addressed.

Once AEA comes to a decision about the structure of its PATs, then it will be up to the Board President to ensure implementation. As the Chief Governance Officer, according to Carver, the Board President will be responsible for communicating the structure to the membership. In the past, all AEA committee members were appointed by the President. This caused many to believe that a small circle of leaders was given the opportunity to participate. Since AEA has collapsed its committees into a smaller number of PATs, new leaders have not been asked to join. At the same time, members are frequently asked to join working groups connected to the staff. AEA will need to decide a transparent, equitable way to populate the PATs. JVA recommends that this process be solidified before announcing to membership what the structure is going to be.

Lastly, JVA recommends that AEA update its New Board Member Orientation packet each time Board Policies are revised. The most recent copy of the New Board Member Orientation packet that was provided to JVA is dated November 1, 2010, and it includes policies that have since significantly been revised. It is wonderful that AEA has formalized its orientation to ensure that new leaders can jump right in. At the same time, AEA must provide members with updated information.

Also, JVA recommends that AEA budget to purchase a copy of Carver's book on policy governance for every new board member. Although AEA has adapted the model, it is the

foundation of its governance, and all members should be able to easily access information on the model.

### Member Engagement

JVA observed that AEA members have differing opinions about which activities constitute member engagement. Some key informants, and even comments from surveyed members, suggest that there are different definitions of what true member engagement looks like. As AEA continues to grow its programming beyond its fall conference, summer institute and TIGs, it will be worthwhile to develop a logic model that maps out various activities offered, the overall goals that those activities link to, the target market for each activity, duration of anticipated engagement, evaluation measures and outcomes. This program planning process will enable AEA staff to determine if there are enough activities for the entry-level professional, skilled practitioner and expert. In addition, a clear definition of what true member engagement is, and what AEA wants that to look like, should be established within AEA to provide leaders with a sense of achievement around this dimension.

As Carver recommends, it is necessary to evaluate governance annually. Since one of AEA's primary driving forces to transition to policy-based governance was a desire for increased member engagement, it is imperative that AEA continue to evaluate member satisfaction and think about what member engagement means to the organization. Developing specific member engagement indicators would be a logical next step once member engagement is clearly defined. An indicator that AEA is sufficiently engaging members could be the number of members actively participating in aea365 and the Coffee Breaks or downloading the Coffee Breaks for later viewing. Or, AEA may decide that it is necessary to also look at the depth of member engagement through participation in small groups. If this is the case, JVA recommends that AEA compare the number of people who were participating in committees in 2010 to the number of people who are participating in PATs, Task Forces and working groups in 2012. Other markers may include the number of conference registrants, membership size, growth and attrition. No matter the ways that AEA decides to evaluate member engagement and satisfaction moving forward, it will be necessary to better define what is considered meaningful engagement within AEA.

JVA recommends annual evaluation of member engagement, which furthers Carver's interest in evaluating the ends and not the means. In order for AEA to do this, it will need to dedicate resources to discern member engagement and the satisfaction or lack thereof of that engagement. Resources to make this evaluation possible may be in the form of staff time or funding for a consultant. JVA recommends a cost-effective strategy of conducting an internally-driven evaluation annually and a more intensive, external evaluation every three to five years. At the retreat in June, one participant shared that AEA needs to take a fluid approach to evaluation of member engagement. He said that if we wait for formal evaluation check-in points, "we may always be behind [our members' needs]..." The member engagement data presented herein should provide some direction in these efforts.

## Transparency and Accountability

As previously mentioned, it is difficult to determine if AEA's decision-making processes are more transparent than before or not. There is evidence to suggest that attempts to increase transparency have been made, but that there is still work to be done. For example, the June Board retreat seemed to be a timely gathering that was important for AEA leaders to coalesce and address concerns about the transition. Significant resources of time and money were dedicated toward the retreat, yet it seemed that there were no formal note-takers, making it difficult to share consistent messaging about the retreat process or outcomes with members who were unable to be present. Patton did conclude the retreat by giving participants time to reflect and think about how attendees would talk about the retreat with nonparticipants. This was a clever way for each person to summarize the retreat in his/her own words. By creating, and making available a summary of these types of meetings, AEA will be able to increase its transparency with attendees and those who couldn't participate in person.

Data from both surveyed members and key informants suggest that there is the potential to increase transparency further within the policy-based governance model. There are immediate adjustments that AEA could make regarding transparency. For example, a hot button to AEA Policies is located on the front page of AEA's website, but it is in the midst of a text-heavy section. It is not immediately obvious where to find the policies, and when a user conducts a search for AEA policies on the left-hand column search function, none of the new policies are contained within the first 20 items that populate in the findings. Although, a seemingly related document titled the *AEA Policies and Procedures* manual appears (document aea100103.pp-2.pdf), once the document was opened it became evident that the document was created prior to the transition; it refers to committees and committee management. There is no date on the document, so it is difficult for members to know if the document is current or outdated. Another document appeared during the search titled *Evaluation, Evaluators and the American Evaluation Association* (aea09.eptf.policyhandouts.pdf). This document is about professional standards and policies—not the policies related to governance. AEA leaders should be cognizant that the website currently refers to “AEA policies” in two distinctly different ways. JVA suggests that all AEA policies related to board governance be titled accordingly, and further recommends that all documents available for reference have a date created or date published.

In addition to posting AEA's board policies on the website, JVA recommends describing how those policies fit together. At the retreat in June, Patton suggested that the policies fit together, and a participant added that the policies fit together like “nesting bowls.” JVA has noticed that AEA's membership needs a better understanding of what the “outside bowl” is. For example, does the conference support Goals Policies? Is the conference an input toward a certain outcome? This needs to be clarified and members need reinforcement about the policies during annual business meetings and periodic communication from the Board President.

JVA recommends that AEA post its board meeting minutes on its website to show the discussion that occurred in getting to the place of speaking with one voice. Carver's method of policy

governance is strict about speaking with one voice. At the same time, AEA is a professional association of evaluators who desire to consider diverse perspectives and debate the options before coming to decisions. By posting meeting minutes, members' concerns that were raised during the retreat in June about dissenting opinions "getting squashed" or ignored may be alleviated.

Another element of organizational transparency arose related to program reporting. Several key informants mentioned that they would like to see more feedback from the Board and ED about programming. JVA recommends that evaluation findings from the annual conference be shared with the board through the Executive Director's report.

Also, during the June Board retreat, several attendees raised concerns about accountability. At the beginning of the retreat, Patton started a flip chart to capture Parking Lot items. However, participants stated that in the past, parking lot issues were never revisited. This was confirmed at the retreat as several issues were left on the table. For example, a participant shared that he was struggling with the distinction between policy and operating procedures. Patton responded that there isn't a right answer and that it's important for AEA to sort out its own distinctions. The group didn't seem to re-address this or decide how to periodically raise this question.

### Continuity and Strategic Planning

JVA recommends that the AEA Board spend time determining what it means to be a "strategic organization." With an agreed-upon definition, AEA will be better able to evaluate whether it is acting strategically or not. In reference to the data included herein, the benefits of focusing on strategy are two-fold. First, a renewed focus on strategy would address the confusion that key informants expressed regarding strategy. Second, an increase in strategic focus would allow those informants who expressed excitement around this dimension to become more involved and reengaged with AEA and the governance process. Following are a few definitions of strategy from business leaders:

**Strategy according to John Carver.** It is the same as planning, except the word strategy always has long-term, big-picture implications, which planning might not. Because it can apply to both ends and means and both governance and management, the term does not help in distinguishing the board's job from management's.

**Strategy according to Peter Drucker.** Analytical thinking and commitment of resources to action.<sup>6</sup>

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<sup>6</sup> *What is business strategy?* Retrieved from <http://www.strategy-keys.com/What-is-Business-Strategy.html>

**Strategy according to Carter McNamara.** *Simply put, strategic planning determines where an organization is going over the next year or more, how it's going to get there and how it'll know if it got there or not. The focus of a strategic plan is usually on the entire organization, while the focus of a business plan is usually on a particular product, service or program.*<sup>7</sup>

**Strategy According to Allison and Jude (2003).** In general, strategy flows from an organization's strategic plan. A commonly agreed-upon definition: *Strategic planning is a systematic process through which an organization agrees on—and builds commitment among key stakeholders to—priorities that are essential to its mission and are responsive to the environment. Strategic planning guides the acquisition and allocation of resources to achieve these priorities.*<sup>8</sup>

JVA suggests that in 2012, the AEA board develop a new vision statement and ensure that all goals and priorities support that vision. Key stakeholders (members, partners, and potential members and partners) will find it valuable to read a concise description of AEA's overall goals. JVA recommends that the goals encapsulate the overall priorities instead of separating them. JVA is not suggesting an altered format of the Goals Policies, simply a consolidated version for effective public relations and marketing.

In addition, JVA believes that AEA should take the opportunity to address strategic issues that were raised during interviews.

1. Should AEA develop a national awareness/education campaign to elevate the profession?
2. Should AEA work to further set standards for professional evaluation projects?
3. Should AEA be more active with other national associations based in Washington, DC?
4. How can AEA attract more diverse evaluators to the table including economists and marketing specialists?
5. How can AEA raise the quality of programming at its national conference while continuing to offer a myriad of presentations?

The above recommendations should assist AEA in taking the next step in its governance and increased member engagement. Results suggest that there have been many successes in transitioning AEA to policy-based governance. However, there are still areas that need to be developed. As many key informants acknowledged, the transition is a work in progress, so it is not surprising that there are areas that still need development. Although it is helpful to acknowledge the transition as a work in progress, there are issues beyond the transition that need attention (e.g., communication). During the June Board Retreat, one participant said,

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<sup>7</sup> *All about strategic planning.* Retrieved from <http://managementhelp.org/strategicplanning/index.htm>

<sup>8</sup> Allison, M., & Jude, K. (2003). *Strategic planning for nonprofit organizations*. San Francisco, CA: Wiley.

“There is no such thing as over communicating during a change process.” AEA should keep this in mind as it formalizes its board structure.

This reports provides an unbiased snapshot as to how far AEA has come in the transition, and the issues that remain. The JVA evaluation and governance teams hope that this report can be useful at many different levels as AEA moves into the future. Moreover, Patton and other longtime AEA leaders conveyed that AEA can help itself while also “mainstreaming evaluative thinking for other boards.” It will be exciting to see how lessons learned will be shared with other associations and nonprofit organizations around the world.



## Appendices

*Appendix A. Member Survey*  
(Attached as separate PDF)

## Appendix B. Key Informant Interview Script

**INTRODUCTION**

Hi Mr./Ms./Dr. \_\_\_\_\_, my name is \_\_\_\_\_, and I'm **with JVA Consulting**. We're working with AEA in evaluating its transition to policy-based governance. We would like to obtain feedback from key AEA leaders to learn more about issues related to the transition. Since you were identified as a key leader, I hope **to ask you a few questions** about your experience as it relates to the transition. This interview should take between 30 and 40 minutes depending on how much you want to share. Is now a good time for you?

- **(If no)** What would be a better time to talk? (try to schedule a new time)
- **(If yes)** Great! (continue with script)

I have a few prepared questions, and while we'd love to get your feedback on all of them, **you are not required to respond to every question**. Please feel free to interrupt at any time—we are really just interested in your experience. Also, feel free to ask me to clarify a question if it doesn't make sense. Finally, **everything you share with me today is completely confidential**. We will be preparing a report that includes quotes from AEA members, but your name will not appear anywhere in this report. AEA really wants to know how the governance shift looks to others, and you are an important piece of learning more. **Please share freely.**

Do you have **any questions** for me before we begin?

**Introduction Material**

Since the current evaluation focuses on AEA's transition to policy-based governance, I'd like to get a better understanding of your role in the transition.

1. Please tell us about your involvement with the transition. (Duties, responsibilities, tasks, focus of work)
  - a. How has the transition shifted your responsibilities, if at all?

**Functioning**

I am now going to ask you about how certain AEA groups have been affected by the AEA transition. I would like to get your opinion regarding AEA overall, then ask specifically about the functioning of groups since the transition began in 2009.

2. From your perspective, how has the functioning of AEA been affected by recent governance-related changes?
  - a. Now tell us how you think the functioning of various groups...
    - i. PATS?
    - ii. TIGS?
    - iii. Task forces?
    - iv. Local affiliates?
    - v. Committees?

**Operation Versus Strategic Focus**

As you may know, the shift in governance was intended to impact the Board's focus on strategic and operational activities.

3. Thinking about recent Board activities since the transition began, please explain if there has been more of a focus on operational day-to-day activities or more of a focus on strategy-related activities...that is, the Board being more deliberate in goals and plans.
  - a. Probe: Specifically, what if any issues have arisen related to...
    - i. AEA Strategy?
      1. How have they been dealt with?
      2. What have been the results?
      3. How has this focus changed or been impacted by the transition?
    - ii. AEA Operations?
      1. How have they been dealt with?
      2. What have been the results?
      3. How has this focus changed or been impacted by the transition?
  - a. Probe: Thinking of the responses you just gave, what factors have facilitated or hindered the move to a greater focus on strategy versus operations?
4. What about a move towards focusing on AEA policies?
  - a. Probe: Since the transition began, have there been concentrated efforts to focus more on AEA policy development?
  - b. Probe: Since the transition began, how has the Board attempted to focus more on formalizing policies (for example refining, writing, and publishing)?
    - i. Probe: What about making policies publicly available?
    - ii. Probe: Do you have any examples of this?

#### Member Engagement

The shift in governance was also intended to impact member engagement opportunities. We will now ask you about opportunities available to members and any shifts you have seen in member diversity.

5.
  - a. Since the transition began, how has governance changes impacted member engagement opportunities, if at all?
    - i. Probe: Do you perceive more or fewer opportunities for members?
    - ii. Probe: Do you see an increase or decrease in member engagement?
    - iii. Probe: To what extent are there different kinds of opportunities available?
      1. Probe: That is an increase in the number of ways visitors are participating?
  - b. To what extent, and in what ways, has the diversity of membership has been impacted because of governance changes? **[as X answers, note how they define diversity]**
    - i. Probe: What about diversity of membership in general?
    - ii. Probe: What about an increase level of participation across the diverse groups within AEA?
    - iii. Probe: Diversity in regards to Race, gender, geography, professional fields, US – international?

#### Accountability, Transparency, and Efficiency

The following questions are related to accountability, transparency and efficiency of the Board. Again, we are interested in how these relate to the governance of AEA.

6. In what ways has the Board become more or less accountable in recent years? Accountability, in Policy-Based Governance, refers to the degree to which each Board member is responsible for his or her own contributions and contributions of the team.
  - a. Probe: Can you share with us why you believe that has occurred?
  - b. Probe: To what extent is this attributable to the governance transition in general or factors within the transition?
7. In what ways has the Board become more or less transparent in recent years?

- a. Probe: Can you share with us why you believe that has occurred?
  - b. Probe: To what extent is this attributable to the governance transition in general or factors within the transition?
8. In what ways has the Board become more or less efficient in recent years?
- a. Probe: Can you share with us why you believe that has occurred?
  - b. Probe: To what extent is this attributable to the governance transition in general or factors within the transition?

### Continuity

An expectation of the new governance model was that it would enhance continuity in planning and organizational direction.

9. To what extent are continuity considerations engaged when AEA leaders are planning for the future? That is, to what degree do leaders constantly adhere to the same principles?
- a. Probe: How has this been represented in strategic planning?
  - b. Probe: How about in the direction of initiatives?
  - c. Probe: How has this changed since the governance transition began?

### Explicitness

Another expectation of the new governance model is that enhance the explicitness or preciseness of Board policies.

10. In your experience, how explicit or precise are Board policies?
- a. How has this changed since the governance transition began?

### Conclusion

11. Considering your unique perspective on AEA in general, and governance issues more specifically. How would you summarize the progress made thus far in relation to AEA's transition to policy-based governance?
- a. Probe: What factors are impeding the transition?
  - b. Probe: What have been some of the positives to come out of this transition?
12. Is there anything else you would like to add?
13. Who else would you recommend us contacting regarding the current evaluation?

***Thank you so much for your time. We really appreciate it, and we really value all that you've shared today. As a reminder, what we shared will remain confidential.***

*Appendix C - Response Frequency by Question*

<b>If you consent to take the survey, please indicate below.</b>	<b>Frequency</b>
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Yes, I understand the statement above, and wish to continue	734
No, I do not wish to continue at this time	16

<b>Are you sure you wish to exit this survey?</b>	<b>Frequency</b>
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Yes. I wish to exit.	14
No. I would like to return to the survey.	0

<b>In what year did you first become a member of AEA? If you do not remember the exact year, please indicate the approximate year:</b>	<b>Frequency</b>
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2011	107
2010	76
2009	65
2008	56
2007	46
2006	39
2005	47
2004	30
2003	17
2002	24
2001	34
2000	27

1999	18
1998	15
1997	16
1996	10
1995	13
1994	8
1993	7
1992	7
1991	5
1990	7
Prior to 1990	60

How many years have you been an official member of AEA?	Frequency
Less than 1 year	134
1-2 Years	105
3-5 Years	178
6-10 Years	162
11 Years+	152

In what ways have you engaged with AEA in the past (check all that apply):	
Note. Members who joined less than one year ago	Frequency



View AEA website occasionally (less than once a month)	75
View AEA website frequently (more than once a month)	36
Comment on AEA social media site (e.g., Facebook, twitter)	3
Comment on AEA's listserve, EVALTALK	3
Subscribed to AEA's listserve, EVALTALK	32
Subscribed to aea365	28
Read aea365	40
Wrote for aea365	2
Voted on public statements	11
Attended annual AEA conference	24
Presented at annual conference	8
Volunteered at annual conference	4
Reviewer for annual conference proposals	8
Chaired a session at the annual conference	2
Chair for entire annual conference (service rotation of 3 years)	0
Chaired session at annual conference	2
Ambassador for annual conference	0
Presented webinar	0
Assisted with AEA journals (editor, author, reviewer, etc.)	1
Journal article reviewer	1

Journal editor	1
Other (please specify)	16

Using the scale provided, please tell us how much you agree with the following statements:

Note: Members who joined less than one year ago

#### Frequency by response option

	(1) Completely Disagree	(2) Disagree	(3) Neither agree/disagree	(4) Agree	(5) Completely Agree	Not Sure
AEA offers opportunities to become involved	0	2	15	52	33	14
AEA is an accessible organization	0	3	8	59	29	17
AEA is responsive to its members	0	0	14	43	24	34
I am satisfied with AEA	0	2	13	65	30	6
I have access to AEA leaders	2	7	31	19	6	49
I see my interests reflected in AEA	0	5	11	57	30	11
I am satisfied with how AEA is organized	0	0	26	38	14	37
I would say AEA is a diverse organization	2	3	17	30	21	43

Would you like to be more involved with AEA?

Note. Members who joined less than one year ago

#### Frequency

YES.	55
NO.	2



Maybe - But not at this time. 61

**What could AEA do to help you feel/become more engaged?**

**Note. Members who joined less than one year ago** **Frequency**

44

**Questions below are those who joined AEA one year ago or longer (through start of demographic questions)**

**Within the PAST 5 YEARS, have you volunteered with any of the following groups within AEA (check all that apply)?**

**Frequency**

Priority Area Teams (PATs)	14
Topical Interest Groups (TIGs)	201
AEA Board	13
Task Force	31
Working Group	21
Executive Committee	7
Standing Committee	21
Ad-hoc/Special Committee	19
Local Affiliate	52
I HAVE NOT VOLUNTEERED WITH ANY OF THE ABOVE GROUPS	347

**Members have different levels of involvement when volunteering for various AEA groups listed on the previous question. Some members simply check a box on their membership application, whereas others actively participate within that group. Has your involvement in the aforementioned group(s) gone**

**Frequency**

**beyond just "checking a box?"**

YES. I feel I have participated in one or more of these groups.	206
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NO. Although I may be affiliated with one or more these groups, I have not participated in any group activities.	42
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**Members have different levels of involvement when volunteering for various AEA groups listed on the previous question. Some members simply check a box on their membership application, whereas others actively participate within that group. Has your involvement in the aforementioned group(s) gone beyond just "checking a box?"**

**Frequency**

YES. I feel I have participated in one or more of these groups.	206
---	-----

NO. Although I may be affiliated with one or more these groups, I have not participated in any group activities.	42
--	----

**Which AEA group are you telling us about first? If this group has a more specific name, please indicate in the space provided.**

**Frequency**

Priority Area Teams (PATs)	6
Topical Interest Groups (TIGs)	118
Board Position	7
Task Force	4
Working Group	4
Executive Committee	3
Standing Committee	5

Ad-hoc/Special Committee	5
Local Affiliate	23

**We want to know a bit about your perceptions of the group in which you were involved. Note: If you are not currently active in the group, please rate the following in reference to when you were active in the group. Using the scale provided, please rate to what extent the group...**

#### Frequency by response option

	(1) Completely Disagree	(2) Disagree	(3) Neither agree/disagree	(4) Agree	(5) Completely Agree	Not Relevant	Not Sure
Completely understands its role	1	11	12	68	67	1	10
Has effective leadership	1	12	20	64	59	1	11
Has procedures that group members understand	3	8	25	72	43	3	15
Has procedures that general AEA members understand	3	13	34	47	24	16	32
Is serving members of the group effectively	1	10	31	66	42	4	16
Is serving general AEA members effectively	1	11	29	59	33	15	23
Is performing its role well	1	7	25	81	42	1	13
Is including members from diverse backgrounds	1	9	14	57	62	2	24
Is functioning effectively	2	11	24	79	40	2	11
Has improved its functioning since you joined	2	10	39	44	37	5	30

**Please summarize the activities of this group during the time you were volunteering:**

**Frequency**

146

Are there other groups you have been involved with?	Frequency
YES. I would like to add additional group involvement.	57
NO. I am finished adding details about my group involvement.	118

Which group would you like to tell us about now? If this group has a more specific name, please indicate in the space provided.	Frequency
Priority Area Teams (PATs)	3
Topical Interest Group (TIGs)	28
Board Position	2
Task Force	4
Working Group	1
Executive Committee	0
Standing Committee	5
Ad-hoc/Special Committee	1
Local Affiliate	12

We want to know a bit about your perceptions of the group in which you were involved. Note: If you are not currently active in the group, please rate the following in reference to when you were active in the group. Using the scale provided, please rate to what extent the group...

Frequency by response option



	(1) Completely Disagree	(2) Disagree	(3) Neither agree/disagree	(4) Agree	(5) Completely Agree	Not Relevant	Not Sure
Understands its role	0	5	4	16	22	1	6
Has effective leadership	0	5	7	21	16	2	3
Has procedures that group members understand	0	7	5	24	11	1	6
Has procedures that general AEA members understand	2	6	8	10	8	8	11
Is serving members of the group effectively	0	5	4	23	11	3	8
Is serving general AEA members effectively	0	5	4	18	7	6	14
Is performing its role well	0	3	8	20	12	2	9
Is including members from diverse backgrounds	0	2	8	14	21	3	6
Is functioning effectively	0	4	10	18	13	2	7
Has improved its functioning since you joined	0	4	13	11	10	6	10

**Please summarize the activities of this group during the time you were volunteering:**

**Frequency**

49

**Are there other groups you have been involved with that you could tell us about?**

**Frequency**

YES. I would like to add additional group involvement.

18

NO. I am finished adding details about my group involvement.

38

**What is the name of the third group you would like to tell us about? If this group has a more specific name, please indicate in the space provided.**

**Frequency**

Priority Area Teams (PATs)	3
Topical Interest Group (TIGs)	5
Board Position	0
Task Force	5
Working Group	2
Executive Committee	0
Standing Committee	0
Ad-hoc/Special Committee	0
Local Affiliate	3

**We want to know a bit about your perceptions of the group in which you were involved. Note: If you are not currently active in the group, please rate the following in reference to when you were active in the group. Using the scale provided, please rate to what extent the group...**

#### Frequency by response option

	(1) Completely Disagree	(2) Disagree	(3) Neither agree/disagree	(4) Agree	(5) Completely Agree	Not Relevant	Not Sure
Understands its role	1	2	1	4	10	0	0
Has effective leadership	0	2	2	4	10	0	0
Has procedures that group members understand	0	3	2	5	7	1	0
Has procedures that general AEA members understand	0	2	4	3	3	3	3
Is serving members of the group effectively	1	1	2	6	5	2	0

Is serving general AEA members effectively	1	0	3	2	5	3	2
Is performing its role well	0	2	1	5	8	1	0
Is including members from diverse backgrounds	0	1	1	7	7	1	1
Is functioning effectively	0	1	3	5	8	0	0
Has improved its functioning since you joined	0	3	2	2	3	6	2

**Please summarize the activities of this group during the time you were volunteering:**

**Frequency**

16

**In what other ways have you engaged with AEA in the past (check all that apply):**

**Frequency**

View AEA website occasionally (less than once a month)	320
View AEA website frequently (more than once a month)	193
Comment on AEA social media site (e.g., Facebook, Twitter)	26
Comment on AEA's listserve, EVALTALK	97
Subscribed to AEA's listserve, EVALTALK	262
Subscribed to aea365	213
Read aea365	241
Wrote for aea365	56
Voted on public statements	209
Attended annual AEA conference	390
Presented at annual conference	305

Volunteered at annual conference	88
Reviewer for annual conference proposals	206
Chaired a session at the annual conference	124
Chair for entire annual conference (service rotation of 3 years)	5
Chaired session at annual conference	73
Ambassador for annual conference	24
Presented webinar	14
Assisted with AEA journals (editor, author, reviewer, etc.)	72
Journal article reviewer	82
Journal editor	8
Other (please specify)	71

**What changes to AEA have you noticed since 2009, if any?**

**Frequency**

336

**Please rate, using the scale provided, the change (since 2009) in the number of opportunities for involvement in AEA activities that are available to you as a member?**

**Frequency by response option**

<b>(1) Far fewer activities</b>	<b>(2) Fewer activities</b>	<b>(3) About the same</b>	<b>(4) More activities</b>	<b>(5) Many more activities</b>	<b>Not Sure</b>
6	6	117	176	70	139

**Since 2009, to what extent has your involvement**

**Frequency by response option**



with AEA roles and activities changed?

(1) Much less engaged	(2) Less engaged	(3) About the same	(4) More engaged	(5) Much more engaged	Not Sure
12	44	278	123	25	34

How familiar are you with how AEA is run (or Governed)?

Frequency by response option

(1) Not at all	(2) A little	(3) Somewhat	(4) Quite a bit	(5) Very
118	194	173	38	15

In general, what is your level of knowledge about AEA's transition to a new structure for governing the organization?

Frequency by response option

(1) None	(2) A little	(3) Some	(4) Quite a bit	(5) Very high	Not Sure
218	174	81	19	13	8

As you perceive at the moment, to what degree do you think the governance of AEA is:

Frequency by response option

	(1) Not at all	(2) A little	(3) Somewhat	(4) Quite a bit	(5) Very much	Not Sure
Transparent	8	37	106	122	45	177
Fair (processes are free from bias)	3	15	66	127	59	224
Equitable to all members	7	25	61	142	59	198
Representative (has your interests in mind)	10	33	83	144	61	165

Accountable (is held responsible for its actions)	4	17	51	123	59	238
Strategic (deliberate in its goals and plans)	2	6	55	161	100	172
Efficient	2	11	62	87	67	264
Precise (detailed and exacting in its planning)	3	12	52	104	48	274
Forward thinking	4	14	61	147	109	160
Consistent (constantly adhering to the same principles)	1	6	48	139	77	222

**Considering the same characteristics, indicate whether they have increased or decreased since 2009.**

#### Frequency by response option

	(1) Decreased a lot	(2) Decreased some	(3) About the same	(4) Increased some	(5) Increased a lot	Not Sure
Transparent	2	4	95	93	16	271
Fair (processes are free from bias)	1	5	125	35	9	306
Equitable to all members	0	5	129	41	11	293
Representative (has your interests in mind)	2	8	127	56	15	272
Accountable (is held responsible for its actions)	1	3	118	42	12	303
Strategic (deliberate in its goals and plans)	1	1	90	87	33	268
Efficient	1	2	98	52	17	309
Precise (detailed and exacting in its planning)	2	2	101	48	16	310
Forward thinking	1	0	93	91	39	256

Consistent (constantly adhering to the same principles)	1	2	126	40	16	293
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What suggestions do you have for improving AEA's governance?	Frequency
	154

Prior to starting this survey, did you know that AEA moved to a policy-based model of governance?	Frequency
YES	195
NO	314

Using the scale provided, please tell us how much you agree with the following statements:	Frequency by response option					
	(1) Completely Disagree	(2) Disagree	(3) Neither agree/disagree	(4) Agree	(5) Completely Agree	Not Sure
AEA has been changing for the better	0	15	117	204	75	80
AEA offers opportunities to become involved	5	15	24	251	181	16
AEA is an accessible organization	4	18	39	250	154	25
AEA is responsive to its members	4	9	74	226	114	63
I am satisfied with AEA	3	17	43	252	165	12
I have access to AEA leaders	9	31	115	135	89	112
I see my interests reflected in AEA	5	31	82	232	119	22
I am satisfied with how AEA is organized	1	10	97	211	92	80

I would say AEA is a diverse organization	2	29	67	200	104	89
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**As a member, please indicate how your satisfaction with AEA has changed since 2009.**

**Frequency by response option**

	(1) Decreased significantly	(2) Decreased some	(3) About the same	(4) Increased a little	(5) Increased significantly	Not Sure
	2	25	224	134	60	42

**Would you like to be more involved with AEA?**

**Frequency**

YES.	206
NO.	58
Maybe - But not at this time.	234

**What could AEA do to help you feel/become more engaged?**

**Frequency**

292

**Are you a United States or international AEA member?**

**Frequency**

United States AEA member	526
International AEA member	93
I do not wish to answer this question.	5

**You indicated that you are an international AEA member. Which country do you most closely identify with?**

**Frequency**

90

**Please indicate your ethnicity?**

**Frequency**

Not Spanish, Hispanic or Latino(a)	455
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Spanish, Hispanic, or Latino(a)	24
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Please indicate your race?	Frequency
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African American, Black	34
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American Indian, Native American, or Alaska Native	8
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Asian	28
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Caribbean Islander	6
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European American, White	412
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Native Hawaiian or other Pacific Islander	3
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Other (please specify)	18
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Gender:	Frequency
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Female	422
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Male	184
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Other gender identity:	1
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Please list other professional organizations you belong to.	Frequency
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	413
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Please choose the option that BEST represents the primary organization in which you work:	Frequency
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College or University	207
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School System	16
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State Agency	21
Federal Agency	32
Local Agency	11
Private Business	142
Non-profit organization	122
Other (please specify)	61



## Appendix D. Remaining Group-Level Rankings

*Table 6. Frequency of Agreement by Group Rating Items for Topical Interest Groups*

Please rate the extent the group (Topical Interest Group)...	Comp. Disagree	Disagree	Neither agree/disagree	Agree	Comp. Agree	M
Completely understands its role (n=136)	1.5%	7.4%	8.1%	40.4%	42.6%	4.15
Has effective leadership (n=134)	70.0%	9.0%	12.7%	44.0%	33.6%	4.00
Has procedures that group members understand (n=127)	2.4%	6.3%	15.7%	49.6%	26.0%	3.90
Has procedures that general AEA members understand (n=106)	1.9%	8.5%	28.3%	40.6%	20.8%	3.69
Is serving members of the group effectively (n=128)	1.6%	8.6%	17.2%	50.0%	22.7%	3.83
Is serving general AEA members effectively (n=115)	1.7%	7.0%	21.7%	46.1%	23.5%	3.82
Is performing its role well (n=131)	1.0%	5.3%	16.8%	51.1%	26.0%	3.96
In including members from diverse backgrounds (n=124)	1.0%	5.6%	9.7%	37.9%	46.0%	4.22
Is functioning effectively (n=133)	1.0%	7.5%	15.8%	50.4%	25.6%	3.92
Has improved its functioning since you joined (n=155)	1.7%	7.8%	35.7%	28.7%	26.1%	3.69

*Table 7. Frequency of Agreement by Group Rating Items for Task Forces*

Please rate the extent the group (Task Force)...	Comp. Disagree	Disagree	Neither agree/disagree	Agree	Comp. Agree	M
Completely understands its role (n=11)	-	-	9.1%	18.2%	72.7%	4.63
Has effective leadership (n=11)	-	-	18.2%	27.3%	54.5%	4.36
Has procedures that group members understand (n=11)	-	-	-	54.5%	45.5%	4.45
Has procedures that general AEA members understand (n=8)	-	12.5%	12.5%	37.5%	37.5%	4.00
Is serving members of the group effectively (n=10)	-	-	-	70.0%	30.0%	4.30
Is serving general AEA members effectively (n=9)	-	-	11.1%	55.6%	33.3%	4.22
Is performing its role well (n=11)	-	-	-	54.5%	54.5%	4.45
In including members from diverse backgrounds (n=11)	-	-	27.3%	27.3%	54.5%	4.18
Is functioning effectively (n=12)	8.3%	-	8.3%	33.3%	50.0%	4.16
Has improved its functioning since you joined (n=4)	-	-	25.0%	50.0%	25.0%	4.00

*Table 8. Frequency of Agreement by Group Rating Items for Committees*

Please rate the extent the group (Committee)...	Comp. Disagree	Disagree	Neither agree/disagree	Agree	Comp. Agree	M
Completely understands its role (n=17)	-	11.8%	-	29.4%	58.8%	4.35
Has effective leadership (n=16)	-	-	-	37.5%	62.5%	4.62
Has procedures that group members understand (n=17)	-	11.8%	-	35.3%	52.9%	4.29
Has procedures that general AEA members understand (n=15)	6.7%	26.7%	20.0%	26.7%	20.0%	3.26
Is serving members of the group effectively (n=13)	-	-	-	38.5%	61.5%	4.61

Is serving general AEA members effectively (n=15)	-	-	13.3%	46.7%	40.0%	4.26
Is performing its role well (n=16)	-	-	6.3%	50.0%	43.8%	4.37
In including members from diverse backgrounds (n=14)	-	-	14.3%	28.6%	57.1%	4.42
Is functioning effectively (n=14)	-	-	7.1%	42.9%	50.0%	4.42
Has improved its functioning since you joined (n=11)	-	-	27.3%	36.4%	36.4%	4.09

*Table 9. Frequency of Agreement by Group Rating Items for Working Groups*

Please rate the extent the group (Working Group)...	Comp. Disagree	Disagree	Neither agree/ disagree	Agree	Comp. Agree	M
Completely understands its role (n=7)	-	14.3%	14.3%	14.3%	57.1%	4.14
Has effective leadership (n=7)	-	14.3%	14.3%	-	71.4%	4.28
Has procedures that group members understand (n=7)	-	14.3%	28.6%	-	57.1%	4.00
Has procedures that general AEA members understand (n=7)	-	28.6%	28.6%	-	57.1%	3.57
Is serving members of the group effectively (n=7)	-	14.3%	-	38.6%	57.1%	4.28
Is serving general AEA members effectively (n=7)	-	28.6%	-	14.3%	57.1%	4.00
Is performing its role well (n=7)	-	14.3%	14.3%	14.3%	57.1%	4.14
In including members from diverse backgrounds (n=4)	-	75.0%	-	25.0%	-	2.75
Is functioning effectively (n=7)	-	14.3%	-	28.6%	57.1%	4.28
Has improved its functioning since you joined (n=7)	-	-	42.9%	14.3%	42.9%	4.00

*Table 10. Frequency of Agreement by Group Rating Items for Local Affiliates*

Please rate the extent the group (local affiliate)...	Comp. Disagree	Disagree	Neither agree/ disagree	Agree	Comp. Agree	M
Completely understands its role (n=32)	-	3.1%	3.1%	50.0%	43.8%	4.34
Has effective leadership (n=34)	-	8.8%	17.6%	35.3%	38.2%	4.02
Has procedures that group members understand (n=32)	-	6.3%	15.6%	56.3%	21.9%	3.93
Has procedures that general AEA members understand (n=14)	-	14.3%	14.3%	50.0%	21.4%	3.78
Is serving members of the group effectively (n=32)	-	3.1%	34.4%	28.1%	34.4%	3.93
Is serving general AEA members effectively (n=17)	-	23.5%	35.3%	29.4%	11.8%	3.29
Is performing its role well (n=32)	-	-	18.8%	59.4%	21.9%	4.03
In including members from diverse backgrounds (n=31)	-	3.2%	12.9%	51.6%	32.3%	4.12
Is functioning effectively (n=32)	-	6.3%	28.1%	40.6%	25.0%	3.84
Has improved its functioning since you joined (n=26)	-	7.7%	19.2%	42.3%	30.8%	3.96



*Appendix E. Member Comments in Response to "Please explain why your engagement level has changed"*

<b>Member comment (unedited)</b>	<b>Coded Category</b>
I feel like more things have been offered.	Activities/Opportunities
Practical range of topics, professional development focus	Activities/Opportunities
The website makes it easy The activities sponsored are useful for my job	Activities/Opportunities
There are ways I feel plugged in that far exceed attending annual meeting == which is not always possible because of cost, scheduling and travel	Activities/Opportunities
I can't attend the conference each year, but there are more opportunities for me to share with employees at my organization.	Activities/Opportunities
more interesting and useful activities offered	Activities/Opportunities
I became more involved in a TIG	Activities/Opportunities
Need for additional learning, opportunities for business, and better visibility as an evaluator.	Activities/Opportunities
I am better aware of opportunities to volunteer.	Activities/Opportunities
The opportunities for engagement are convenient for me and my work schedule (i.e., many opportunities for involvement don't require a huge time investment).	Activities/Opportunities
more resources available	Activities/Opportunities
More opportunities offered.	Activities/Opportunities
There are more opportunities to engage with things that don't take a lot of time, like the coffee breaks, linked in group posts, and aea365 posts	Activities/Opportunities
Because there are more opportunities for no cost member involvement from a distance.	Activities/Opportunities
Because there have been more opportunities for professional development.	Activities/Opportunities
more opportunity	Activities/Opportunities
Saw an opportunity to become involved with a TIG I care about.	Activities/Opportunities
I grew in seniority and explored opportunities to be more involved.	Activities/Opportunities
Easy to connect	Activities/Opportunities
They have offered so many terrific resources that cover topics of interest, are geared to fit my schedule and are manageable budget-wise.	Activities/Opportunities

The AEA 365 and AEA Coffee Breaks have provided significant opportunities to become more involved and to learn more. These are great tools, although sometimes the AEA 365 is a bit much (fewer posts per week might be more manageable for busy professionals). Also, I took advantage of the opportunities to comment on AEA recommendations to the Obama administration on the development of an internal evaluation policy and on the AEA cultural competence policy.	Activities/Opportunities
aware of more opportunities	Activities/Opportunities
I became more dedicated to the evaluation field and interested in the opportunities provided.	Comfort/Familiarity
the more contact I have, the more opportunities I am aware of, and the more I participate (positive catch 22)	Comfort/Familiarity
Less engagement in the beginning was due to my newness, not knowing other evaluators, intrinsic shyness. So, the change has, in part, been due to my own comfort level with the group and at the annual meetings.	Comfort/Familiarity
I wanted to be more involved in the organization so I could be better at my job and stay abreast of current evaluation research activities. I decided to take a more active role in recent years.	Comfort/Familiarity
I see it as part of my professional development and networking	Comfort/Familiarity
It's a mixture of more opportunities and my own maturation in the field.	Comfort/Familiarity
More confident in my ability to participate	Comfort/Familiarity
I've attended more conferences and presented, gotten to know more people and issues.	Comfort/Familiarity
I have become more familiar with the opportunities available	Comfort/Familiarity
Longer history with the association, so was asked to serve in a more significant way.	Comfort/Familiarity
I began in '08 as a new graduate student and new evaluator; as my capacity has increased, I've presented more.	Comfort/Familiarity
Felt more connected after attending my first conference in 2010, contributed to a few LinkedIn and listserv discussions, and got a proposal accepted for the conference in 2011.	Comfort/Familiarity
I'm developing more as an evaluator. I graduated at the end of 09 and am now a professional evaluator.	Comfort/Familiarity
Evaluation is a second career for me and I joined when I went back to university for a degree specific to evaluation, previously Operations Research/statistics, and as I have become more comfortable I have become more involved. My transition has mirrored AEA's scale up of activities for members, worked out well. Plus many of my teachers from Claremont are active AEA members.	Comfort/Familiarity
i have more experience as an evaluator	Comfort/Familiarity
i became more interested as I have learned more.	Comfort/Familiarity

I have become more familiar with the way things work and the more I've learned the more involved I want to be.	Comfort/Familiarity
increased awareness of what is available especially after becoming a member and attending conference in Texas.	Conference
proposed a panel session for 2011 meeting, wrote a aea365, and reviewed papers for 2011 meeting	Conference
I presented with a panel at AEA 2010 and will be an individual presenter at AEA 2011. I also have been volunteering more within the organization, and have presented at/been involved with the conference of my local affiliate.	Conference
I am going to my first conference and presenting.	Conference
I started reviewing proposals after attending the conference for a couple years.	Conference
I submitted proposals this year for the November 2011 annual meeting	Conference
Unable to attend the annual conference.	Conference
my attendance at the annual conference last year in TX motivated me to become more engaged, though most of my participation has been utilizing the website resources, and following TIGS	Conference
Function as reviewer for annual conference and volunteer as chair.	Conference
more online access and information sharing	Electronic
fell more part of it, access to more stuff I am interested in more useful stuff, e.g. AEA365	Electronic
More available on web	Electronic
More on line mailings and chats	Electronic
I participate in activities offered on-line and feel more a part of the organization.	Electronic
The online professional development information has supported my ongoing efforts.	Electronic
I could partake in activities without travelling to conference.	Electronic
Love the AEA 365 blogs.	Electronic
have participated in a webinar, which would not have been available previously.	Electronic
I visit site more as a result of emails about events, news, policy changes, etc.	Electronic
I have noticed more opportunities, through email and the website. I personally have not engaged with any.	Electronic
My engagement level has changed because there are now many more opportunities for me to participate . For example, I can choose to read and comment on linked in posts, participate in scheduled webinars, or comment on position statement(s).	Electronic

Better communication about what is new with AEA via email and website	Electronic
There are more learning opportunities (webinars, aea365, etc).	Electronic
More opportunities to participate via my personal computer.	Electronic
Web-based opportunities make it more convenient and more cost effective for me to participate	Electronic
I have been visiting the 365 blog regularly and subscribed to it - very interesting information. I have also joined the LinkedIn group.	Electronic
Greater number of emails from AEA. I have also attended several Eval Talk sessions and webinars presented by AEA.	Electronic
I'm based in Europe so AEA365, webinars, etc are an easy way to engage if desired	Electronic
I have taken advantage of the aea365 emails and felt more connected to the organization through them	Electronic
As above, don't know if this is what you are getting at, but my "engagement" has increased through use of the resources on the web. Also, I do forward postings and resources to other evaluators more than I used to, primarily because they are very useful for practice. However, as noted before, I don't often have the opportunity to actually attend meetings.	Electronic
More online options for between annual meeting engagement	Electronic
I am a late adopter of social media, but do like the coffee breaks and Claremont U presentations/talks and wish my work schedule would allow for more participation - they are always on interesting topics.	Electronic
I find the way information is presented easier to engage with given the demands of my work. I read a great deal more of what is available through the website and the commentary.	Electronic
The 20 minute webinars are particularly useful as is the resource library	Electronic
I have paid more attention to the online communication, resources, etc. Due to conflicts with work, I have not been able to attend the past few AEA annual meetings, but I have downloaded a number of papers and presentations from the online library.	Electronic
Contributed to aea365; presented a post-conference workshop	Electronic
I read AEA365 daily and make use of hyperlinks therein. I have attended webinars. I respond to member surveys such as the recent survey regarding increased international activities.	Electronic
subscribed to more services, use the e-library more often	Electronic
More opportunities, including web-based opportunities, were available.	Electronic
because of webinars since I cannot afford attending the annual meeting	Electronic

Receive information through email which allows me easy access	Electronic
For the first 3-6 months, did not participate at all. Then started subscribing to aea365 and Thought Leaders discussions, checking out a few webinars, looking at website, etc.	Electronic
I appreciate the increase in web-based learning opportunities as I have been less able to attend the annual conference.	Electronic
1. I read the aea365 postings daily and find something useful between 33 and 50% of the time. 2. I will have an article published in New Directions in Evaluation in the fall 2011 anniversary issue	Electronic
Receiving and forwarding information I receive from the weekly updates; participating in webinars; reviewing proposals	Electronic
in a passive way through 365 blog and coffee break webinars and actively as ad hoc reviewer for AJE	Electronic
Coffee break webinars are great plus I became vice-program chair for my TIG	Electronic
Following social media more	Electronic
more engaged online - works for the limited time i have	Electronic
Little by little I became more engaged in reading stuff and in subscribing to daily posts and online group work.	Electronic
I am creative! I like to sing and I have been able to share this at AEA	General/other
I like that the community is smaller than AERA and want to be more actively involved in it.	General/other
Have carried many roles; newer members taking over; moving into other areas	General/other
I have always been quite active...e.g. I was program chair and then chair of the IC TIG back in the '90's. The VPAT has taken a lot of time but not that much more time that I would have expended on the Ethica Committee to which I had just been appointed as the shift to the policy governance structure started.	General/other
Why? Academic pursuits created a partnership	General/other
I tended not to engage in AEA activities.	General/other
Starting in 2009, I became the president-elect of another (international) association and am currently the president. That involvement has taken much of the time that I spent working on AEA related activities.	General/other
I have been disappointed with my efforts to engage with the organization. When I have presented at the conferences, there were no people in the audience.	General negative

The nature of the committees/task forces that remain, such as they are, provide opportunities for people with very specific backgrounds and in time-limited ways, so limit involvement opportunities for non-elected persons who do not possess the specific expertise required for focused task forces. Coupled with explosive growth in the size of the membership and pushing operations to paid staff means that only a special, elite few have the opportunity to be appointed to participate in organizational governance activities.	General negative
Difficulty signing up for webinars...lousy support when I contacted organization. Never able to connect to professional development of interest.	General negative
Not sure how to get involved. When I go to conferences, people pretty much seem to have their groups.	General negative
I teach program evaluation and use aea365 for my class discussions, I look for resources for teaching.  have not had much interaction with teaching TIG - the TIG does not seem to have activities outside the annual meeting.	General negative
Dissatisfied with annual conference	General negative
Just lost a lot of interest in AEA as a whole. Too many people seek leadership roles to do nothing more than promote their books, their consulting businesses, and their egos. The substance from the 80's and 90's just isn't there anymore and hasn't been for a long time now.	General negative
It is the same, as it was difficult to be engaged before, and it has continued to be that way.	General negative
I was more involved while I was a graduate student. Now that I'm not a graduate student, I see fewer opportunities to be involved at a similar level (I reviewed student proposals annually).	General negative
I was disillusioned after getting a conference proposal outright rejected. While I am a seasoned evaluator, I do not feel that the organization is less and less supportive of the new evaluator and those who are primarily practitioners.	General negative
I have found other organizations/associations more fruitful in regard to current information, dialogue regarding evaluation and research, and willingness to be more forward thinking	General negative
The elimination of standing committees removed a mechanism for appointment of persons to participate in the routine conduct of the organization's business. The task force structure is uneven. Communication with the Board became more challenging; Board asked for information but little guidance came back. Answer was always that they hadn't figured that out yet; PBG was still evolving.	General negative
My involvement has been consistently low throughout.	General negative

I would like to become more involved but I don't know how.	General negative
AEA is becoming increasingly irrelevant. Way too much time and effort is devoted to talking about evaluation instead of on doing it and producing persuasive and defensible conclusions. I did a comparison of the AEA program with one for the UK-EES, and the comparison was stark. The latter had many fewer navel-gazing sessions, many fewer on qualitative this and that, fewer on politics, and so on; many more sessions on results of evaluations and methods for doing them, especially quantitative evaluations aimed at producing conclusions.	General negative
I joined in 2009, so NA	General/Other
I joined in 2010.	General/Other
Joined in 2010	General/Other
I joined in 2009	General/Other
I did not know AEA before 2009.	General/Other
I became a member	General/Other
I made a commitment to myself to attend the conference annually. I live in Canada and I am an independent consultant with a new business. The conference, especially travel and accommodations, represents a great financial expense to me (No sponsorship, no employer or university paying my expenses). It is worth it, however.	Locality/Distance
Distance issue - working internationally, so access AEA resources online mostly.	Locality/Distance
I am living in Europe. My engagement depends on the possibility to travel to the US.	Locality/Distance
As an overseas member i do not have the opportunity to be present at AEA evnts. However, i have been invited to participate in several events, such as review papers, respond to election of office bearers, occasionally seek fellow members for literature gathaering, etc.i am more actively involved as a reader of the several e-news letters that AEA sends to its members.	Locality/Distance
I work on projects in Africa (Nigeria), Israel, and Mexico all related to education reforma and culture. AEA helps me to think about forms of evaluation that would benefit these programs. The Archdiocese of Chicago Catholic schools are moving to standards based assessment. I am on that team for developing the tools. AEA helps me to organize around that task.	Locality/Distance
I have moved to Portland and got involved with OPEN, Oregon Program Evaluation Network and joined the leadership team. That motivated met to reingage with AEA.	Locality/Distance
I am American, but work and live overseas, which limits my involvment.	Locality/Distance
I am now located in the US and so the AEA is more relevant to my work.	Locality/Distance
I'm not a resident of the US.	Locality/Distance

I moved out of the U.S. and found it hard to stay involved. I'm also trying to work on my dissertation and have tried to avoid distractions so I can finish it.	Locality/Distance
My involvement is different, yet about the same in terms of activities. My activities shifted from serving as a program chair to serving on a PAT.	No change
I think my engagement level has not changed. I try to make the annual meetings as I feel these are usually very valuable. I have a few people I have met over the years and who I enjoy reconnecting with but I am sorry to say I have not made more personal connections. I am not sure what the organization can do about that as I think it may be more of a personal thing, not an organizational thing.	No change
this is just an artifact though because I have had some scheduling problems attending the conference - which is where I participate mostly. My remaining participation is on Evaltalk and to a much lesser degree, reviewing things like Joint Stds.	No change
Has not changed.	No change
It hasn't.	No change
No change	No change
About the same suggest no change....	No change
Has not really changed	No change
hasn't changed. challenge is being busy with other commitments.	No change
It hasn't	No change
Living overseas now.	Personal
See above. Budget constraints at my agency have prevented me from attending annual conferences.	Personal
It changed because my job changed.	Personal
AEA has not been as relevant to my current project work.	Personal
Change of professional position. And a move to a State that does not have a well organized affiliate group.	Personal
Just personally less engaged due to changes in my employment.	Personal
I had a baby in December 2010 and was not able to attend the annual conference. I am also not able to attend this year due to the dates conflicting with my professional responsibilities. My involvement has gone from in-person to online involvement so I especially appreciate the additional online content and opportunities.	Personal
Retired from university administration; now operating evaluation/applied research firm - less free time.	Personal
Life has got in the way. Became a mother and focused more on family than career	Personal



My responsibilities changed at work from evaluation to data analysis reports.	Personal
changed jobs and i have more time	Personal
Change in job	Personal
Although the number of activities has increased, I am beginning a disengagement process as I near retirement.	Personal
Growing older	Personal
Was not able to attend last year's meeting	Personal
I became an independent consultant three years ago and felt I needed to be more connected with the evaluation professional community and to keep up to date with developments.	Personal
Internal funding -- no funds for the conference which was my main form of involvement in the past.	Personal
Personal illness .	Personal
The Thought Leader's Forum has drawn me in, but partly it corresponds with my own life change in entering candidacy in a PhD program.	Personal
I'm getting older!	Personal
I have come to a place in my career where I'm limiting my service.	Personal
I don't conduct many official program evaluations these days and have not had time to fully absorb AEA goings-on. I am also not much of a joiner; I'm afraid I am more of an interested observer.	Personal
I have a job that only pays for 1 conference a year, and AEA is not the main conference for my profession, so I've had to forgo attending. Also, in the past I was able to volunteer at the conference to defray costs of attending, but this year and last that wasn't possible (and won't be in the future since I'm no longer a student). I love AEA and plan to become more involved again in the future, once my current (term-limited) position is over.	Personal
No employer reimbursement for membership and activities	Personal
I graduated and entered the workforce. It was somewhat easier to get involved as a student and get funding to go to conferences.	Personal
Dissertation work taking priority.	Personal
Been busy in other professional associations, and at my day-job.	Personal
Mostly work related, have not had the time.	Personal
Didn't apply to any conferences due to funding from institution	Personal
I'm trying to volunteer more.	Personal

Unfortunately, my levels have dropped since then because of unemployment and underemployment given my relatively unique situation as a trailing spouse.	Personal
Change in job responsibilities (with less focus on evaluation/research and more on administrative duties) due to changes in leadership at the organizations I have worked for	Personal
With the economic downturn, my org. has been operating with smaller budgets and a reduced staff. There has also been very limited support for attending conferences (essentially no support).	Personal
Retired from evaluation work.	Personal
Become too busy with evaluation work.	Personal
I'm also in flux with my career so was able to engage a lot in 2009, but less so in 2010 as my work increased. Now, I will have more time to re-engage.	Personal
It was time for others to have leadership opportunities.	Personal
Dealing with a lot more at my worksite, part due to the many hats I wear at my small local government in addition to evaluation and in part because serious budget problems have resulted in my losing 50% of my staff to do the work.	Personal
I have more time now that my work life has stabilized!	Personal
Workload changed: increase in evaluation projects and decrease in research project.	Personal
More Board responsibilities since 2009	Position change/Group involvement
increased responsibilities	Position change/Group involvement
Starting a state affiliate organization	Position change/Group involvement
Became an elected official on the Board of a local affiliate.	Position change/Group involvement
Involvement in TIG (i.e., beyond membership to participation)	Position change/Group involvement
Became a Program Co-Chair	Position change/Group involvement
became a TIG chair.	Position change/Group involvement
I've initiated a TIG and serve on the founding board for my state affiliate.	Position change/Group involvement
I have more proposals accepted and I am also chairing a session this year.	Position change/Group involvement

Participated in plannign meeting for first iime in Indigenous TIG in 2010, becaome a paper reivewere in 2009.	Position change/Group involvement
Though I was on a PAT, even it's function was phased out as of June 2011. Not at all clear what task forces Management might have organized, or how one can volunteer to be involved.	Position change/Group involvement
I repeatedly offered to assist with the CDC/AEA summer institute in any capacity. I live near Atlanta. I offered to work registration, introduce speakers, etc. I was never asked so I quit offering after about 4 years.	Position change/Group involvement
I became a Board Member of the local affiliate.	Position change/Group involvement
Committee tenure was up...	Position change/Group involvement
was the chair of recruitment task force and currently gov tig chair	Position change/Group involvement
Became a journal editor	Position change/Group involvement
I was just coming off the AEA Presidency and Chairing the EPTF! I needed a sabbatical from AEA leadership!	Position change/Group involvement
became much more involved on journal reviews (NDE), task force participation, helping TIGs develop/update their website, been "found" as an evaluator by outside agency for consulting work due to my name/company being on the AEA website, and being able to provide more input to AEA on their new docs, policies, etc.	Position change/Group involvement
I am active in TIG	Position change/Group involvement
I was nominated to be on the awards committee and on the AJE editorial board	Position change/Group involvement
This was the first year I reveiwed papers for the conference	Position change/Group involvement
Have been asked to participate in AEA level groups, etc.	Position change/Group involvement
mostly the increase in opportunities and to some extent my own amount of time available.	Time
I have more time to be involved	Time
Currently engaged with ASQ and can only give to one org at a time.	Time
I don't have time to put together presentations for the conference and I don't see another way to be involved that is of any benefit to me	Time

I had more time to get involved because of changes in my professional responsibilities.	Time
My identity as an evaluator has increased and I have a bit more time in my personal life as my children get older.	Time
I'm at a place where I given a lot to the organization, but I'm not finding as much value in it. Every year, it's a decision on whether AEA is worth the time I invest.	Time
I felt that it was time for me to stop complaining and take a leadership role in my TIG.	Time
Recently completed my doctorate and have more time.	Time

*Appendix F. Member Comments in Response to "What could AEA do to help you feel more engaged?"*

<b>Member Comment (unedited)</b>	<b>Coded Category</b>
Could increase its attempt to become More transparent, more forward thinking, more inclusive	Access
Conferences could be more accessible	Access
be more clear about what distant ways someone could be engaged in contributing vs. solely benefiting from info exchange.	Access
more webinars at different times and days, because presently I am always in class during the webinar time.	Access
more volunteer opportunities that are open to all members (i.e. not just those who know someone); more online trainings/webinars that are more intensive and focused on skills building (i.e. 1/2 day or full day trainings like Claremont)	Access
the purpose of this survey was very confusing (i.e. governance as well as member satisfaction with services).... "governance" is a bit esoteric to many of us who are run of the mill members and difficult to provide feedback on .....while satisfaction with current services and suggestions for future ones is much easier to conceptualize	Access
Make the activities of the board more transparent (e.g., activity announcements, calendar).	Access
schedule the annual meeting at a different time of year	Access
Offer more publication options. White papers, perhaps, or archives of sample evaluation instruments, methodologies, etc.	Access
Open up task force and other action related activities more broadly.	Access
continue working on transparency.	Access
Messages about what is valued as evaluation research could be more inclusive, and not pooh-pooh RCTs at every turn.	Access
I just looked through the web site and do not see minutes from business meetings, or reports from various committees archived anywhere. Providing this information on the web page would make governance more transparent and help members feel more connected to the leadership.	Access
invitation to leadership meetings	Direct communication
they do very well, I like the monthly newsletters with info and links, and suggestions re how I could be more involved.	Direct communication
Tell more about what is available and how we can get involved with each area or where you need the help as an organization.	Direct communication
more communication and opportunities for involvement (other than leadership positions) in TIGs for new members.	Direct communication
May be summary emails that come out monthly listing opportunities for involvement (you may already do something like this).	Direct communication
Emails to offer opportunities (of various levels of commitment in time & manpower) for involvement. For example, serve as peer reviewers, serve as facilitator at paper presentation @ AEA Conference, etc.	Direct communication
Remind me of the various areas in which my active involvement might be useful to the organization.	Direct communication
Advertise opportunities to volunteer on website (apologies if this is already done) or in emails (once or twice a year).	Direct communication
I would like more content emailed to me in blurbs or links that is current and relevant - not just membership and policy info. As a practitioner, short bursts that I can incorporate into my work would be beneficial.	Direct communication
More information	Direct communication

Publicize the ways in which members can a) run for office, (b) become reviewers; and provide summary of board meeting minutes either as part of one of the journals or, by providing a link from EVALTALK or aea 365.	Direct communication
Clarify, advertise, promote opportunities for participation.	Direct communication
Just keep providing information on the opportunities for involvement that are available.	Direct communication
Maybe annually reminding us of the different ways to become involved and how.	Direct communication
Tell me about opportunities to get involved and tell me about the benefits. Having a new member session/mixer at the annual conferences might help too. I don't know if there is one...	Direct communication
AEAs communication needs to be rethought. I get a newsletter that is no fun to look at. I get Evaltalk. Then there are additional forums that I don't want to have to monitor. Regarding TIGs you do a good job providing infrastructure for reviewing proposals. Seems like you could provide them structures for communicating with their members. e.g. listserves & newsletters.	Direct communication
Email newsletters are nice but too long. Short webinars look very interesting but can't imagine how 20 min could do topic justice so haven't tried but should.	Direct communication
Offer more opportunities via email to sign up and become involved. At this time, I have no idea how to become involved other than through a TIG or acting as an ambassador at an annual conference.	Direct communication
Keep providing opportunities to volunteer and be involved.	Direct communication
Maybe solicit a call for reviewers via e-mail or e-mail opportunities for volunteering at the conference (they might do the last and I've ignored it because I can't often attend). hmm - and maybe the reviewing I have done was in response to an open e-mail request. I can't remember if it is AEA I've reviewed for or AERA.	Direct communication
Have TIG leaders ask for meeting volunteers if they need them.	Direct communication
Personal communication	Direct communication
be more responsive to member's request to volunteer.	Direct communication
Communicate the process for getting involved - at the moment you have to 'be in the know'.	Direct communication
Keep offering opportunities and explaining how to get involved. Repetition is appreciated.	Direct communication
I wish that our TIG's had communications throughout the year about who we are and what we are working on, we could possibly strategize collaborative presentations.	Direct communication
Accept offers when I volunteer -- or at least tell me why I haven't been selected and what I could do to improve my chances. Make it clearer how the TIGs work -- I belong to some but never hear from them unless it is conference time or time to elect someone -- am not sure that TIGs are meaningful. I joined the evaluation policy task force, but it isn't clear to me how decisions are made about what to focus on. I've responded when they solicit requests for feedback or ideas, but then what? Who actually works on them or decides?	Direct communication
Make opportunities to be involved more visible and beyond volunteering to help with the annual conference. For example, it's not always entirely clear how individuals are selected to participate on committees and various task forces.	Direct communication
I'm wondering how people get invited to write for 365, review articles/proposals or help wit conference events. No one has ever asked me to contribute. Asking for something discrete and specific is a great way to get me to say "yes."	Direct communication

Provide (or at least allow space for) more opportunities for initiatives of interested members to form short-term or long-term task forces to carry out functions they feel would be of value to at least segments of the AEA membership and other entities related to evaluation, within the US and globally.	Direct communication
Respond to emails etc. by staff. Also, allow new people to become involved instead of the same people all the time.	Direct communication
Send out notices of further involvement in committees/boards/task forces.	Direct communication
Provide opportunities for involvement, for examples opportunities to teach the Evaluators Institute, offer workshops at AEA Conference, contribute to newsletter and publications. While these opportunities probably exist, accessing the opportunity seems to be a challenge. So possibly periodically send out a note to members with ideas or suggestions for engagement opportunities.	Direct communication
raise awareness of opportunities for engagement more often, while I am and have been interested to volunteer, most of the time opportunities have come up at times when I was not able to dedicate time. emails about opportunities are and have been very useful.	Direct communication
The responsibility for becoming more engaged is mine. AEA can support me in this by continuing to share lists of opportunities for involvement (perhaps on the listserv as well as the website), and by gentle reminders like these.	Direct communication
Add volunteer opportunities to weekly or monthly news letter.	Direct communication
More information about the opportunities available, what the qualifications are, the time commitment and responsibilities of that involvement.	Direct communication
Continue to announce leadership positions that are open.	Direct communication
send out email with how to get involved with committees or serve as reviewer	Direct communication
Send list of positions, opportunities. Explain the structure	Direct communication
Contact me directly.	Direct communication
Regular listings of what is available and how to do a task	Direct communication
On line communications and invitations to participate at beginner levels.	Direct communication
I appreciate the emails asking for involvement e.g., reviewing papers	Direct communication
More direct communications from TIGs especially. I think the amount of information via the online presence of AEA as a larger association is excellent and keeps me informed about and connected to the major things going on, the major thoughts, etc. But, it seems there is the opportunity for more relationship building and involvement at the TIG level but that is more elusive.	Direct communication
Create a menu of opportunities to become more involved...perhaps mentor new members.	Direct communication
Invite me to become involved in specific ways.	Direct communication
Providing very real (i.e., actual - as stated by incumbents) estimates of the time commitment and work load to participate in various roles may help. Clone us. ;-)	Direct suggestion
AEA would need to give more attention to health program evaluation.	Direct suggestion
Continue to provide web-training opportunities, power-points, and professional evaluation links to sources, methods, procedures, forms, surveys...	Direct suggestion
more info from the TIGS that I signed up for	Direct suggestion
Identify which activities you need help with and estimate the time involved. I don't like to commit to help without knowing how much time it will take. Not sure what skills are needed for certain activities. It might be good to describe what is needed.	Direct suggestion

Offer short opportunities to provide input for people like myself who have limited time for involvement in major activities. This survey is good example, I have 20 mins to give feedback whereas can't commit to a lot of time with a TIG, or committee. Would also keep members up to date on issues facing organization. Involve people in just a few opportunities a year - don't send everything or it will seem like too much.	Direct suggestion
keep offering a range of trainings	Direct suggestion
Provide technical support to TIGS for a web-presence	Direct suggestion
More webinar or small conference group meetings or opportunities related to topics, etc.	Direct suggestion
Development of more evaluation tools and protocols/guidelines	Direct suggestion
More opportunities to do things that aren't huge commitments, for example a time-specific work group or task that requires assistance so I can pick and choose things that work with my schedule. Right now I mainly participate by reviewing proposals for the conference and am happy to do it. I wouldn't mind doing more if the opportunities were there.	Direct suggestion
I love the idea of webinars and blog and the concept of evaluators sharing our knowledge and skills with each other.	Direct suggestion
Articulate the benefits of the engagement and specific of what would be required. The amount of time to commit and the length of involvement required.	Direct suggestion
I'd like to see AEA embrace other sectors besides education, health services, and international development. For-profit, military, and national security sectors are still under-represented and could benefit greatly from the evaluation field. These sectors are where I primarily work in.	Direct suggestion
I am pleased with the communications offered, the website, linked in, webinars, etc. Not sure what more I would expect.	Direct suggestion
Continue offering coffee break webinars and other web-based interactions.	Direct suggestion
Webinars	Direct suggestion
I really appreciate the web-based learning opportunities.	Direct suggestion
Provide delayed access to webinars so that member from overseas could be involved and host the annual conference off shore on occasions	Direct suggestion
Offer volunteering opportunities with reviews, editing, planning coordination etc.	Direct suggestion
Reach out to the TIG leaders to help us become stronger leaders. Connect the TIG leaders with other TIG leaders. I would ultimately like to see the PreK-12 TIG influence federal education policy -- at the moment, I'm not sure how to steer us toward that goal. Much of our work for the past couple of years has been keeping the PreK-12 TIG from completely falling apart. We've breathed life back into the TIG, but now we need direction and support. Is this something we can ask AEA leadership for or should we work within our own TIG to find a way?	Direct suggestion
* solicit volunteers for reviewing for AJE * I have major problems reading the EvalTalk listserve. I don't know if it's that it doesn't interact well with my web browser (Google Chrome), my webmail, or if it's just the way it is. I don't currently read it because of its cumbersome navigation. I would very much like to be able to read it. While I need to take the time to investigate the problem more, I do wonder if the listserve format needs to be checked to make sure there isn't a technical problem.	Direct suggestion
I would like to be involved in a TIG on evaluating programs that serve the homeless and formerly homeless.	Direct suggestion
Aggressively recruit leadership roles and post more offers for joint conference posts across disciplines with other professional organizations.	Direct suggestion
More opportunities for online learning	Direct suggestion



I enjoy writing and editing and have 3 years experience as the abstracts editor for the visitor studies association. I've also dabbled in peer reviewing articles for publication. These are the sort of activities I would like to be more involved in.	Direct suggestion
offering distinctive participation formulas where people could select in which strategic area or development would like to get involved.	Direct suggestion
Include more evaluation discussions or materials in the context of higher education and research efforts	Direct suggestion
I feel that there are already a variety of opportunities to become engaged at different levels. At this point in my career, balancing school and work leaves limited time to become more engaged. I appreciate the availability of ways to be involved that take relatively little time (like coffee breaks and opportunities to review and vote on the cultural competence statement).	Emerging professional
See #15 - seek out funding and sponsorships to engage more young/beginning behavioral scientists from under-represented minority groups, as well as women. Mentor/train/encourage/promote their professional and academic development.	Emerging professional
I think some of the events are cost-prohibitive. Especially for evaluators who are just starting out, we don't have a lot of personal money to spend on professional development, and budget-strapped organizations will likely not be footing the bill either. I'd love to attend an annual conference, but I'd probably have to use personal vacation time at work and pay for the entire thing myself. It might also be nice to have events/offerings tailored to that demographic: advice on grad school (choosing a program, do you need a master's or Ph.D., etc.), choosing an industry to work in, areas to focus on for professional development, etc.	Emerging professional
Continue to embrace the differing skill sets of younger or newer members and provide opportunity for them to share with the membership  Perhaps establish a system to help bring new or less-experienced members into work groups or committees that might connect them to current leadership and expose them to skills needed for future leadership opportunities.	Emerging professional
Nothing. I've learned to select among many opportunities to keep a good balance. I may want more involvement, but I don't have the time to get involved with everything. I'm setting priorities better than I used to. Unfortunately for this survey purpose, I have not put AEA high on my list of needs to get more involved. I want my students to be more involved, however, and I advocate for AEA every chance I get.	Emerging professional
Have opportunities for current Ph.D. students	Emerging professional
I find AEA to always be a welcoming place. However, I am not always sure how to enter in to groups that are already formed. I think it would be helpful at the annual meeting or through emails from various TIGs to have these TIGs provide guidance and help in soliciting new members within their TIGs. For example, at the annual meeting it would be helpful if TIGs would be more consciously solicit involvement of their membership--provide a forum at the TIG meeting to talk about what the goals and role and needs of assistance within the TIG. When members renew membership, do all of the TIGs send out an email welcoming members to the TIG, describing the TIG's early goals, etc., asking members to become involved/active and giving suggestions on how this might be done? That might be helpful to those of us who feel a little less connected as it makes clear what expectations/goals are for the TIG and how members might become more active.	Emerging professional

I'm not sure. At this time the thought of adding more to my plate is overwhelming (between working full time and getting my PhD).	Emerging professional
Nothing. It's up to me to take the initiative. AEA is a little outside or on the periphery of my particular field of expertise so I sometimes feel like there aren't a lot of connections with people I may have a lot in common with. Perhaps AEA could do a better job at encouraging new members to become involved. A little more hand-holding, so to speak, to find out why people are joining, what their needs and expectations are, find out how to foster those new relationships. I think I would have appreciated that and it would possibly have helped me to figure out where and how I fit into the organization. I feel somewhat out of my league in AEA, in spite of having worked in the field of program evaluation for over 10 years. I'm looking for a job (lost mine 14 mo. ago) and have applied to several postings on AEA but never get responses at all, so in spite of my experience, I must not really be qualified for them. And I'm not sure why--as far as I can tell, I've been a perfect fit for every job I've applied for. Perhaps AEA could help members figure out their niche?	Emerging professional
provide some support or guidance for new TIG leaders in terms of expectations, info about how we fit into the larger organization, both personally as leaders of a TIG and as a group, as well as some historical info about the development of the TIGs.	Emerging professional
For years my colleagues and I have submitted proposals for pre-conference workshops in a new area of expertise for evaluators, yet each time, it is rejected--only to see that a large percentage of the workshops are the same ones presented, year after year. I have been very active in other professional organizations at the national level, in leadership positions and an integral part of the intellectual community--only in AEA have I encountered so many roadblocks.	Emerging professional
As a grad student, I'm not sure how many opportunities there are for involvement, but it would be nice if there were opportunities targeted at students specifically. It feels difficult to break in to organizations and gain experience and the ability to do that would be great.	Emerging professional
I just had a bad experience with the 2009 conference as far as the location, which really limited my enjoyment of the conference. Since then I have been unable to attend, and I've felt a little out of the loop just because I haven't been around and I've been working on new things. I'd love to become more involved in the next year, as I transition out of my job, which didn't really allow me the time to work on evaluation. I'm a postdoc and it would be useful to know how I fit within AEA as a postdoc (I realize postdoc positions are rare in evaluation, and mine is not in evaluation but in social science research).	Emerging professional
I have signed up the volunteer form and received no feedback. Outside of getting into the mix of subcommittees with a meaning I am not sure how else. I am still pretty new to the association.	Emerging professional
I have no idea who I can be involved-- I am not someone who has been doing this for 20+ years and it seems like you have to be to get involved with article reviews or reading submissions for the conference	Emerging professional
more opportunities for graduate students in leadership positions	Emerging professional
I was fairly new to evaluation when I joined AEA and feel that I am still a novice in many ways. I don't know if there are any TIGs for "new evaluators" that might focus more on best practices. If there were, I would probably be more active and directly participate. Though I am highly motivated with the work the TIGs do that I am part of, I feel I have limited contributions because of my lack of experience.	Emerging professional

Have more diversity of ideas and actively recruit younger researchers/academics on their own merit and ideas rather than having to be associated with a leader or known commodity	Emerging professional
Mentorship from experienced evaluators and leaders and getting involved with clear direction from more experienced AEA members.	Emerging professional
Ensure that new--and especially different!--blood is able to grow into leadership positions in the organization. Leadership from predominantly academia is stifling. In some TIGs leadership turnover is conspired against. I think if AEA is to keep members happy, it has to do a better job of legitimately opening the doors to others being involved.	Emerging professional
Create a variety of structures for senior members that would not interfere with the influx of new voices. Both are important resources for a healthy organization.	Emerging professional
Find ways for TIGs or leadership or governance to have purposeful inclusion of graduate students. Internships within the organization or designated student spots. I feel strongly that AEA must be mindful that the continuation of its presence in society is heavily dependent upon students taking up evaluation in grad programs. AEA should encourage graduate students specifically to get involved in the organization by designating roles for grad students that "grooms" them for leadership in AEA.	Emerging professional
I think I would like to have additional information from the Alcohol & Drug TIG - to keep up with specific evaluation strategies in this field.	General/Other
Reviewing, policy, committees	General/Other
Have good website support....someone to answer questions. Everything I've tried to do has fallen into a black hole ....no return!	General/Other
Opportunities to integrate inside the organization by providing opportunities in form of research projects and their fundings, jobs learning opportunities internships etc.	General/Other
more things related to healthcare, from the provider point of view	General/Other
I enjoy the conferences and at the 2011 I will be a presenter. I hope to continue making contributions as such.	General/Other
I am willing to work on task forces related to government (federal/grant) evaluation. I also now do work as a data manager working as a project manager of IT projects (using agile development processes - SCRUM) and am a large data manager (and reporter). I can help the organization from an IT side.	General/Other
Increased involvement re: annual meeting	General/Other
Right now my colleague is responsible for keeping our department connected to AEA. This person is very involved. The problem I see is that I do not know what all the roles are that this person is involved in and so I sometimes feel left out of the discussion.	General/Other
Stick to the core mission and not tangential issues.	General/Other
It's not you!! It's my life, my work, my commitments and difficulty in prioritizing. I don't know where this goes...but in general, we are bombarded by information from many different directions. I don't want a lot of information but I do want seminal information. Unfortunately this differs for members. You cannot satisfy everyone. I believe this is why I value the newsletter because I am certain this is what you want us to know. This is the alert..the official information. So thank you! And we just worked on a 365 tip..and that's a good innovation...probably too many innovations for me to know them all. But someone out there does and appreciates all the different opportunities to be connected.	General/Other
I might want to provide something on AEA 365 and am not entirely sure who gets invited to do so.	General/Other

It may sound silly that I'd prefer to have greater involvement although I'm not sure what that looks like at the present - it's something I've been promising myself to do. Perhaps I can learn more to consider during this November's conference	General/Other
I would like to be able to access an individualized (and confidential) portfolio of evaluation-related knowledge, skills, abilities, and experiences that I could use to track which I already have, which I'd like to acquire, and suggested resources or curriculum that AEA can provide either directly or through referrals. I think AEA should focus on education and professional development, keeping all members up-to-date on the latest important findings in psychological science as well as other fields that contribute to the practice of evaluation. Also, I suggest that AEA partner with APS, the Association for Psychological Science, of which I am a member. The values and goals of the two organizations seem to me to be quite compatible. Also, I believe that AEA should prioritize "sustainability" as a core value of evaluation, and that sustainability should be the focus of and/or a vital component of ALL the activities of AEA.	General/Other
<p>You have been making some significant changes and I am getting more involved as a result. Thank you!</p> <p>I believe I could be more involved, but would need to have some connection and conversation with other professionals to take that next step, since I am busy operating my practice. Access to free or low cost professional development is very high on my list as a seasoned (20 years) independent evaluator. Opportunities for collaboration are always valuable for independents who work alone or with a small number of subcontractors. What I would like, but have not made happen yet, is arranging to have a mentor or some other small group of professionals to use as a resource and sounding board in my practice. I practice in a community with only one other evaluation group, so there is a sense of isolation and lack of a "community of practice" to continue to grow as a scholar and practitioner. I am attracting very large and high profile projects and want to be sure my practice is aligned with the most current information, best practices, and that I have a more active professional community to be involved with and be supported by.</p>	General/Other
I'm not sure. Most of us grew up with a paradigm of involvement via attendance at meetings and face-to-face interaction with colleagues. Given the severe budget cuts and membership in multiple professional associations, I just do not have the resources to attend meetings any more. Perhaps we could try some online conference sessions using VoiceThread (or something in real-time) or other technologies. We (those at a distance) could pay a smaller fee for the cost of the technical set-ups, but, at least we could hear and interact with those attending the conference. As well, perhaps the AEA could come up with a list of "needed chores" for volunteering that would be sent out as an e-mail once a month. Otherwise, there's just so much in the newsletter, I tend to get lost in the details.	General/Other
<p>Set standards for membership that will exclude "members" who are evaluators only by self-declaration.</p> <p>Create a forum for the real difficult questions, like the one above.</p>	General/Other
<ol style="list-style-type: none"> <li>1. Engage regularly</li> <li>2. Communicate regularly</li> <li>3. Set aside seat for people from Africa</li> <li>4. Link members to organizations who would require consultancy services</li> <li>5. Rotate the annual general meetings to other continents apart from NA</li> </ol>	General/Other
Make it clearer how the organization is run, the only time I hear from senior officials (other than through some of the social networks) is at election time which seems a strange way to run an organization.	General/Other

If they would advocate for federal programs and others to utilize the AEA list of evaluators. This has helped me tremendously. If AEA would seek to include/partner with smaller businesses (minority, woman, disabled, veteran owned). If AEA would do "speed dating" or "highlighting" promising evaluators so larger organizations, governments, and/or universities would consider partnerships/other opportunities. If AEA would gather and post evaluation RFP's that could be bid on (vs. just job openings) on their website.	General/Other
Just appear to be more engaged in issues that matter to evaluators, rather than as a conference organiser. In other words act more as a professional body.	General/Other
I would rather be answering questions about access to products!	General/Other
AEA seminar is expensive, I feel. I hope to take the helpful seminars with cheaper fee. And I am also willing to start engaging in AEA activities with less workload. Too much responsibility is a burden when I first involve in the job. Hopefully, I can start engaging in AEA next year.	General/Other
When I gave feedback regarding the cultural competency policy (not sure that's the exact name), I wasn't really sure if my feedback was taken seriously. I have a master's degree in intercultural communication and suggested the language "cultural proficiency" be used because proficiency implies a higher standard of cultural understanding than the commonly used "competency." I thought that this comment was overlooked and that the resulting document was pretty much "same 'ole, same 'ole" and not very progressive or challenging to the membership. Sometimes it's good to stick with common usage but researchers who have proposed the terminology cultural proficiency have a solid basis for doing so. I'm concerned that originality is sometimes squashed in AEA's wanting to reach consensus on a topic.	General/Other
my main interaction is through conference and publications. This is appropriate for a professional society. The main thing you could do is improve your website - it is archaic, to say the least. Impossible to find information, impossible to find info about conferences, etc. You might consider webinars, which would be much more affordable than the on site seminars. you might consider a digital library and online versions of publications.	General/Other
Should have recognized me for reviewing conference proposals in 2009. I thought it was unfair that I reviewed proposals and was not mentioned in the conference brochure. Since then I have withstood from volunteering with AEA.	General/Other
Change the goals of the organization in the direction of fostering high quality evaluations with important policy implications at national and state levels. Do more to educate policy makers about evidence based policy making and about the role of AEA in developing that evidence.	General/Other
AEA could take into account international members interests, abilities and experiences in a more effective an open way.	International
Stronger links with Canada and CES	International
There are many evaluation groups out there - for me, getting to an AEA meeting in the US is difficult - especially on the west coast - we don't have the budget for this. You might consider having sub-group meetings in Europe. I would be happy to be involved in setting up something like that.	International

<p>my earlier attempts to contact some experienced evaluators failed as the mechanisms of communication within the AEA site were not familiar to me.</p> <p>For overseas members if a few volunteer members are appointed as contact-focal points we could seek their guidance and assistance to resolve professional issues. It would perhaps enable a larger number to be in contact with AEA services and also network frequently while accruing benefits from the membership. Thank you.</p>	International
<p>Have a platform for inclusion of international evaluators. If you see the professional development or other panels, there is very little engagement. One reason I am given is that 'quality' may not be appropriate. There is a choice to however actively involve and engage and perhaps hand hold. Also collaborations with other evaluation associations would be helpful - such as sending delegates from AEA or vice versa and this could include sponsored or dedicated panels.</p>	International
<p>Opportunities explicitly extended to overseas members (and perhaps some ideas about how this could happen)</p>	International
<p>Put me on a working group with like minded people with similar expertise and make me produce (along with the group) a resource for AEA members that captures my interest and expertise. In this way I feel like I am making a contribution, I get to work with others and add value to what's on offer to members.</p> <p>Take an interest in our Evaluation Association (ANZEA - Aotearoa New Zealand Evaluation Association) in our country and partner up on a project so that we build collaborative relationships that are mutually beneficial, e.g. our Evaluator Competencies project is new, has great potential and may be of interest to others.</p>	International
<p>I've recently started to use AEA resources more and have tried to incorporate them more into my work, I guess it would be beneficial to have more international development gear information and resources as a lot of theory (in my opinion) and outside the international development (i.e. USAID) realm</p>	International
<p>Difficult tension since AEA is "American" - what should its commitment be to international members? In trying to embrace an international dimension would this result in a dilution of commitment to American context?</p>	International
<p>The annual meetings have become overwhelming in number of sessions, activities, and people. The # of TIGs seems unmanageable. Now AEA wants to branch out-- and clearly is pushing for--some kind of expanded international role in development. I think it is becoming much too big, aggressive, and "expansionistic". It is not operating with objectivity as champions push their agendas (recent survey on international agenda an example of bias and poorly done). Lobbying done for Marco Segone for an award was I thought bad form. Something is being lost in the organization. I think AEA should survey its membership more on issues before taking a political stance. Also its big receptions at annual conferences seem cliquish and not very friendly or inclusive unless one is a new member. I guess more folks need to step behind their rhetoric and look at their actions.</p>	International
<p>I would like to see more international opportunities, including networking with international colleagues at AEA conferences and international travel opportunities to visit with allied partners abroad.</p>	International
<p>More attention to members outside the USA</p>	International
<p>more international venues of participation</p>	International
<p>System of international chapters with monthly supper meetings with a speaker.</p>	International
<p>As an international member, please continue to explore web-based platforms to extend the professional development opportunities (e.g., the conference workshops) more broadly (i.e., web streaming or post-event download)</p>	International

More on evaluation in international ( development) settings. Public sector US is far too removed for the realities of what I need to know or need to contextualise.	International
Find ways to encourage those evaluators who have devoted their entire life to the field as internal evaluators by findin ways to provide avenues to publish their work and increase eligibility for awards. AEA 365 has made an effort it is probably one of the few avenues where someone who is not perceived as a scholar or educator can get his or her work out there to be seen and valued.	International
AEA is a US based organization and US residents are its main audience. This is okay. So by definition I'm an outsider. Being far away from the US (Middle East) doesn't help. I don't feel excluded though.	International
Explain more about its new governance structure to International members who cannot in person become active members. I think it was a major flaw of the survey that this was not explained up front as such an explanation would have enabled a much more informed response to be made to the survey instrument which I think was poorly designed with this in mind	International
Really you can't - I'm a Canadian and my view is that I am a "peripheral" member, not central to your mandate but happy to be along for the ride.	International
Lower cost of annual conference - registration & housing Adjust conference schedule to avoid Saturday (see prior notes) Conference locations that do not look like "junkets," i.e. casinos, resorts, and amusement parks as this prevents many amongst us from getting travel approvals. Less of an international focus - we are the "American" Evaluation Association I understand that task forces need to be of a functional size but membership should be opened to more than "the chosen few."	International, Professional barriers
If there were activities locally, I could be involved in those. I'm not sure what those activities should be though, other than periodic get-togethers.	Local events
I think the AEA has done a good job engaging me to be more involved. It is difficult for me to be more involved due to my location, travel and budget constraints. I also feel that I need more exposure to evaluation work and training so that I can increase my knowledge which will enable me to become more involved in AEA activities. I have been participating in the TEI at George Washington University where I am gaining that increased knowledge.	Local events
I'd like stronger engagement at the State level. I can't afford to have my entire team attend national conferences and would welcome a State level conference where they could be involved.	Local events
I'd like to know more about how local evaluators can be involved beyond just TIG membership. What committees exist? Where might I best bring my experience so it would have the most value for AEA?	Local events
As indicated in the previous response, more community-focused engagement would be helpful. AEA does a marvelous job with offering opportunities online and through the annual conference and more community-based activities or opportunities would increase the accessibility of these tools dramatically.	Local events
My local affiliate is very weak... the leader needs to be replaced (Colorado).	Local events
- get back to me when I volunteer for a task. - offer more regional activities - have a TIG focused on early childhood issues.	Local events
Notice of AEA events/evaluators in my region	Local events
Promote more activity at the regional/subregional level.	Local events
Are there local branches? Local activities may help build more personal connections.	Local events
participate in national and regional meetings	Local events

facilitation of networking among members at times other than the annual conference (small regional meetings?)	Local events
I would like to see a local chapter of AEA.	Local events
more meetings in the midwest, so I could afford to attend. Or perhaps more virtual sessions for long-distance "attendance".	Local events
Honestly I'm not sure. I think most of the 'blame' is on my end in that I often don't bother to read the e-newsletters and I'm not attending the conferences anymore so that cuts down on my engagement, which I miss. But until state budgets improve, I won't be attending any more conferences and things like webinars don't really make me feel engaged for some reason. I like the in-person contact.	Local events
I'd probably need to know more about what is needed and what I can do without physically traveling - something my institution is not supporting right now.	Local events
Provide free webinars and an employment site	Local events
The regional chapter is a great idea, although I haven't been involved yet. My primary duties deal with administration, rather than evaluation.	Local events
As I mentioned above, my underemployment is my only concern, and AEA can create job opportunities in my locality.	Local events
Locally held information or discussion groups; not conferences	Local events
More information about local chapters and activities (if they exist).	Local events
Perhaps have smaller regional meetings. The conference is so big it's hard to participate. But I love how practical the sessions are - less theory and more real life is always welcome.	Local events
Target small proprietorships and small partnerships with services and items of interest	Local events
I am already very actively involved!	Nothing/Don't want more
I need to take the initiative	Nothing/Don't want more
already quite involved	Nothing/Don't want more
That's a great question and I will need to think about it.	Nothing/Don't want more
Not sure	Nothing/Don't want more
Not sure	Nothing/Don't want more
I know that AEA is a very important and helpful organization for my professional activities and I have to make an effort to become more engaged to AEA.	Nothing/Don't want more
Not sure.	Nothing/Don't want more
The organization is doing very well on this. I just need the conference timing to work to my advantage in 2012.	Nothing/Don't want more
Nothing.	Nothing/Don't want more
I think that AEA has done a great deal to engage its members. I cannot think of anything else that would make me feel more engaged. I'd love to do more, but I have other responsibilities.	Nothing/Don't want more
Not certain. I am now transitioning to an independent consulting practice, so my needs and interests may change.	Nothing/Don't want more
Not sure	Nothing/Don't want more
I am not sure yet. I may be changing my work status to retired and not yet ready to completely depart the work force.	Nothing/Don't want more



I'm just way too busy to become more engaged. AEA has done a great job making resources/tips easily accessible.	Nothing/Don't want more
not much, my primary limitations are time.	Nothing/Don't want more
My level of engagement represents the time available for such activities at this time.	Nothing/Don't want more
Create more hours in the day! Sorry, I am unable to be more engaged until my work load lightens.	Nothing/Don't want more
Nothing to add to previous comments.  The ball is in my court.	Nothing/Don't want more
Nothing. It's up to me!	Nothing/Don't want more
Nothing. My level of engagement is related to my other responsibilities. I am very happy with my level of engagement. I respond to surveys :), I am on the AJE editorial board, and I attend and present at the conference every year.	Nothing/Don't want more
Not sure at this time	Nothing/Don't want more
I think AEA does a great job of providing opportunities for engagement as well as of notifying members of those opportunities.	Nothing/Don't want more
I think the newsletters are good, I just need to catch up with what is going on.	Nothing/Don't want more
I don't want to be more engaged.	Nothing/Don't want more
AEA is doing plenty -- the rest is up to me!	Nothing/Don't want more
I think it does a lot, actually. I get emails asking me to be involved. It's up to me to take advantage of the opportunities provided. I can't think of anything more it could do because I think the communications have increased and there's more ways for me to find out what's going on in AEA (online ways). I will attend my first AEA conference in November and I'll see if the leaders there are good at helping new attendees like me to feel engaged.	Nothing/Don't want more
I'll be better able to answer this after my first conference this fall.	Nothing/Don't want more
Nothing. I use my relationship to AEA as a means for keeping touch w/ evaluation as a field or profession and it serves me well this way.	Nothing/Don't want more
I don't want to be more engaged. It is fine as it is.	Nothing/Don't want more
As I get reacquainted with AEA I will let you know.	Nothing/Don't want more
It depends much more on my proactive behaviour.	Nothing/Don't want more
Find me more time. At some point, I would like to get involved again.	Nothing/Don't want more
Nothing- it is up to me to take the opportunities that are offered.	Nothing/Don't want more
I think AEA provides opportunities and it's just up to me to find the time and ways to get more deeply engaged.	Nothing/Don't want more
Nothing--there seem to be many opportunities for involvement if one chooses to use them.	Nothing/Don't want more
I already feel as engaged as I want to be with AEA. Time, not opportunities prevent me from doing more with AEA.	Nothing/Don't want more
see previous comments	Nothing/Don't want more

Nothing. It offers myriad opportunities for engagement. My lack of engagement is due to personal circumstances, not to the organization.	Nothing/Don't want more
Not much - the everyday pressures of getting our work done precludes participating in many extracurricular activities	Nothing/Don't want more
Personally, I am very engaged with AEA. AEA and its leaders have given me many wonderful opportunities over the years.	Nothing/Don't want more
I have to find the time to contribute more as I am part of many different associations and networks with other responsibilities. I do appreciate that AEA does a very good job at keeping me informed as well as seeking out my opinion on larger policy issues.	Nothing/Don't want more
At the moment, am doing my phd and have no time to engage into AEA activities like I wanted to.	Nothing/Don't want more
I don't want to be more engaged. If I change my mind I will get in touch with my TIG leaders.	Nothing/Don't want more
It's mostly my own lack of time that prevents my from being more engaged.	Nothing/Don't want more
You do a great job. It's my personal obligations that limit me at this time.	Nothing/Don't want more
I would have to give it thought - brainstorming with others would help.	Nothing/Don't want more
I live in New Zealand so AEA is only one of three evaluation organisations I belong to. I feel suitably engaged to AEA, given that I am more engaged with the associations that are located physically closer to me.	Nothing/Don't want more
Unfortunately, work gets in the way of participation. I would hope I can find a way to engage more actively in the next few years when my work life is less hectic.	Nothing/Don't want more
I'm already over-engaged with AEA! That's why my response was "no." It wasn't because I'm not interested.	Nothing/Don't want more
No opinion	Nothing/Don't want more
I am very good and do a lot I feel now, when my kids are older, I'd do more.	Nothing/Don't want more
Nothing... this is an issue re personal priorities.	Nothing/Don't want more
Nothing. I am retired and withdrawing slowly from the profession.	Nothing/Don't want more
It's not AEA as much as having the time.	Nothing/Don't want more
My lack of engagement is my fault and not due to lack of AEA opportunity. No real change needed in the organization as far as that is concerned. The change needed lies with me and my own circumstances. Members must take personal responsibility and be accountable themselves.	Nothing/Don't want more
Actually I think is not about AEA changing, but rather me taking more initiative to take advantage of the many opportunities that already exist in AEA.	Nothing/Don't want more
For me, everything is in place until I start networking with people at meetings.	Nothing/Don't want more
I think AEA and my TIGs have done a good job of reaching out.	Nothing/Don't want more
I think AEA does a good job with getting their members engaged.	Nothing/Don't want more
Really, I just need to graduate and then I can return attention and resources to my AEA membership. I truly value the organization and think that its leadership is strong, effective, efficient, increasingly becoming more diverse, and extremely competent. I really appreciate the online methods to engage and applaud these enhancements and membership benefits.	Nothing/Don't want more

I think what AEA does in this respect is great; I would just need to seize some of the opportunities myself.	Nothing/Don't want more
Not sure. Barriers have more to do with my position in a university, and less to do with the organization itself.	Nothing/Don't want more
I indicated I don't want to be more involved/engaged in AEA. I am already quite involved and engaged and don't have time for more involvement.	Nothing/Don't want more
I think AEA is doing a good job of outreach to members without being overly intrusive and I appreciate this. Respect for privacy is important while balancing this respect with providing information and opportunities to acquire skills and information from the organization.	Nothing/Don't want more
I am already engaged enough.	Nothing/Don't want more
Nothing. AEA always sends out invitations for opportunities, so it's not about what AEA can do, it's more about my schedule	Nothing/Don't want more
Nothing right now. It is my secondary professional organization and it meets my need just fine.	Nothing/Don't want more
nothing at this time	Nothing/Don't want more
create more time in the day. ;-)	Nothing/Don't want more
Nothing, I am limited in how involved I can become at this point in my life as I work full time and have two young children at home.	Nothing/Don't want more
Just keep the information flowing. In my current employment at a public university, engagement is most likely to happen through the annual conference but it simply is not possible to in the current state budget to travel to conferences every year, depending on the location.	Nothing/Don't want more
continue to offer opportunities	Nothing/Don't want more
It is good enough	Nothing/Don't want more
not sure	Nothing/Don't want more
Nothing! I don't think I have time at this point to become more engaged but if I wanted to there are plenty of opportunities.	Nothing/Don't want more
just now everything from AEA to me is O.K.	Nothing/Don't want more
I'm fine - don't worry about me!	Nothing/Don't want more
Nothing -- I'm as engaged as I want/need to be.	Nothing/Don't want more
Not sure. It's more what I should do to become more engaged in the organization.	Nothing/Don't want more
Not much as I am satisfied and as an old emeritus prof I am about where I should be	Nothing/Don't want more
The main issue for me is my own time. Becoming involved in AEA is just not one of my priorities right now given work and personal demands.	Nothing/Don't want more
It's not AEA's responsibility to help me do this, it's up to me to become more engaged.	Nothing/Don't want more
Nothing. I am very happy in my retirement.	Nothing/Don't want more
Have to think about that.	Nothing/Don't want more
I feel sufficiently engaged. I don't think AEA needs to make me feel more engaged.	Nothing/Don't want more

I have little time left over from teaching, consulting and research. I suppose used aea as a regular outlet I would become more involved.	Nothing/Don't want more
Not much.	Nothing/Don't want more
nothing, really - it's about my job and time	Nothing/Don't want more
not sure, sorry!	Nothing/Don't want more
My current level of engagement is reflective of available time and resources, and how that fits with my current position.	Nothing/Don't want more
I think AEA is doing everything they can. The challenges are more related to my available issue and follow-through.	Nothing/Don't want more
Not sure.	Nothing/Don't want more
Not sure.	Nothing/Don't want more
Becoming more engaged with AEA is not one of my priorities at this time.	Nothing/Don't want more
I value the conferences and publications, as well as reading news from AEA from time to time. But I have a full time job and don't plan to be deeply engaged.	Nothing/Don't want more
Already have enough opportunity to become more engaged	Nothing/Don't want more
What do you mean by engaged? That I would participate more? that I am pleased with what AEA is doing? that I would be more professional in my work because of it?	Nothing/Don't want more
Agree to do my other work on my behalf!	Nothing/Don't want more
-See my comment about having the opportunity to review journal articles.	Professional barriers
-Maybe it's my lack of confidence, but does a person always have to have a PhD? Doesn't work experience count for anything?	
A better balance between evaluation practice and research. I'm not a PhD, but I work in the evaluation field. I often feel out of my element at conferences.	Professional barriers
More concentration on evaluation practice - AEA still appears dominated by academics, in my view. In addition, balance US based practice with practice in other places, e.g. EU, Africa etc. Taking the time to write up and publish articles is something expected of academics - who are on salary. We lose out on practitioners' learning because this contribution is not rewarded financially. Is it time for AEA to pay those who are not academics to take time off to document their work?	Professional barriers
Mostly up to me to initiate and follow through.	Professional barriers
Publications do not seem to represent the diversity of thinking of members.	
Not sure what AEA can do about that.	

Hard to say. I belong primarily to keep abreast of what is going in the field of "evaluation" as a field of inquiry and as a professional endeavor, as, for the past 30 years, I have been a self-employed program evaluator of primarily small human service operations, mostly operated by private, non-profit organizations. Having no "formal" education in evaluation as such (although my bachelor's and master's are in sociology), I have read a lot about program evaluation, inclusive of the two journals that AEA provides as part of its membership, and I have occasionally thought about enrolling in one of those AEA-sponsored courses, but they're awfully expensive, interfere with my day-to-day work, and I'm not at all certain how they'll benefit my business, so I never have. From what I can tell, AEA appears to be dominated by PhDs and professionals affiliated with universities, colleges, and large companies, with a focus on fields of inquiry and large studies that do not align very closely with my work. True, there is an Independent Consultant interest group and several other interest groups that theoretically focus on areas of inquiry in which I am engaged, but most of their activities appear to revolve around the annual conventions, which I have never attended, because they are expensive, interfere with my day-to-day work, and I'm not sure how they would benefit my business. So, I have never really felt like AEA is my organization, only an organization that keeps me apprised of what is going on in the field of program evaluation, some of which I am able to apply in my work.	Professional barriers
your organization appears to be intended more for people who are exclusively involved with pure evaluation and the studies, etc involved in conducting research and reports so there is often not as much material that is directly applicable to my work as a program developer and manager	Professional barriers
Reach out to members like me who are not visible.	Professional barriers
Broaden types of paper accepted for publications in Journal.	Professional barriers
not sure- different status of members creates a kind of hierarchy- where more privileged academics hold much of the power and status.	Professional barriers
Sometimes I feel that only the big dogs get the attention, the theorists, not practitioners. I would like to see more status and esteem given to practitioners.	Professional barriers
I do not work full time, so to be honest I feel less qualified than others to be an active participant in AEA.	Professional barriers
This really is more an issue of my own time constraints rather than anything AEA has/hasn't done around engagement. Often, I'll find the volunteer opportunities quite interesting, but am daunted by how I would combine them with an already challenging workload as an evaluator in the nonprofit sector. I guess the other thing that sometimes deters me is thinking that, although I have been an evaluation professional for over 15 years, I'm not in the "big leagues" or in an academic setting, so may not have the skill set or experience that AEA is looking for in volunteers.	Professional barriers
Quite frankly, the newer practitioners don't seem to have the credentials and therefore the respect of the academics who seemingly control the organization. Break that barrier down.	Professional barriers
I can't remember the last time I spoke with a board member, task force member, or someone from the nominating committee. The members of the inner circle are now bringing in their former graduate students to be the next generation of insiders, but many of us don't have the pedigree. Come out and talk with some others who have been supporting the organization for many years.	Professional barriers

How many of your new members fit the ordinary category? You may think it's silly, but I feel marginalized because I don't fit into a 'special' group. Nothing I do is special enough to be worth noting, it's too ordinary and too workhorse and too local. But I think its important because if evaluation is going to be as pervasive as we know it needs to be, the plain jane versions should be important too.	Professional barriers
Begin a candid discussion of evaluator competency. Not everyone can or should be evaluators.	Professional barriers

*Appendix G. Member Comments in Response to "What changes have you noticed to AEA since 2009, if any"*

<b>Member Comment (unedited)</b>	<b>Coded Category</b>
Better newsletter and more opportunities for training through brownbag webinars. More efforts to engage the general members.	Activities
More professional activities to join; more on line information; more response from members	Activities
There are many more opportunities to learn, through Coffee Break, techtalk, etc. I find it much more of a resource beyond the annual conference which was the key activity in the past. This more ongoing, service commitment to members is a huge change and a very valuable one.	Activities
More web-based activities	Activities
- great short easy-to-access skill building opportunities	Activities
- reasonable list-serve activity	
More web-based activities for members	Activities
I'm not sure what year things started so hard to say, but recently it seems that AEA has created a number of new learning options.	Activities
More out-reaching activities via web and mail	Activities
Greater non-conference activities	Activities
More activities	Activities,Conference
More receptive to creativity as an Association - that is, it feels like annual conferences are more engaging	
More valuable inputs from members	Activities,Conference
Active annual conference planning, use and post-reflection	
No changes in learning from others on international development and evaluation	
There is more association activity in between conferences.	Activities,Div/Outreach
The association asks for feedback and input regularly.	
The association welcomes fresh leadership and new ideas.	
Unfortunately, have not been to an AEA meeting since 2006, as I am independent and work in rural Wisconsin--don't have funds to travel. I have noticed many more opportunities for learnings via the web, both the webinars and the postings on the website. Have really made use of these and feel they are excellent. Appreciate also the news updates that share information on AEA being more involved in evaluation policy issues.	Activities,Increased electronic presence
more activities, such as AEA 365 notices, summer school courses...	Activities,Increased electronic presence
The social media presence is much stronger.	Activities,Increased electronic presence,General negative
There is influx in leadership and uncertainty about PBG on the side of those individuals who are more actively involved at AEA.	

Greater professional development and educational opportunities online and focus on international issues, and offering enhanced services and opportunities for member involvement...	Activities, Professional development
Communications has been more systematic.  Really haven't seen any other changes. Perhaps, it could be that I wasn't paying attention because I think AEA offers great value to their members as compared to other professional associations.	Communication
Increased communication	Communication
I think AEA has become more proactive in communicating with members.	Communication
more communication	Communication
Better communications from the association to members	Communication
More modes of communication, participation	
more clear communications	Communication
Sincerely, from where I stand, I did not see major changes with the AEA. What I do notice though is a real effort to put online many useful resources for evaluators which were not available a couple of years ago. I do really much appreciate those efforts.	Communication
increased communication with the membership - which I think is great  more information about advocacy work  more information on available tools (the geek side of me loves that)	Communication
more communication and training opportunities	Communication
I seem to get more updates and communication information.	Communication
The organization seems to be increasing the frequency of its communications, but not to an unpleasant rate. I think it's reaching out well with relevant material and communication.	Communication
Increasing communication with members.	Communication
More communication	Communication
improved communication with members	Communication
More communication from the president, and monthly (?) newsletter e-mails	Communication
More membership communications it seems; the TIGs (maybe there were around before but seem to have more profile now)	Communication
AEA has begun to focus its messaging in a more balanced (i.e., internally- and externally-oriented) fashion. That is to say, in addition to communicating with members who are fluent in the jargon, AEA has become "bilingual" in a sense; it's begun to formulate messages using language and references that broader audiences are more accustomed to. As a comment, this allows AEA to participate in a fuller range of professional discourses that "talk about and do" evaluation with little or no awareness of the evaluation profession; so, though it might seem proactive, it can also be seen as remedial.	Communication
more email communication	Communication
More communication to members about different initiatives, new TIGs formed	Communication
many more channels of communication	Communication
There has been an increase in level of communication and in activities being offered to members.	Communication, Activities



I have noticed a marked increase in communication and engagement activities. There are many more ways to access and receive information that prior to that conference.	Communication,Activities
Good communications and use of internet	Communication,Increased electronic presence
The coffee break demonstrations, webinars, increased use of social media, adding the 356 blog, expert discussion board. Generally, I would call this increased member engagement. Also, more clear communication about opportunities to volunteer and be engaged in the association.	Communication,Increased electronic presence
More communications. More opportunities to get information (e.g., the 365 blog & webinars)	Communication,Increased electronic presence
Better web based communications	Communication,Increased electronic presence
AEA has branched out and is using social media and other web-based modes of communication to provide opportunities for feedback and member interaction	Communication,Increased electronic presence
Better information sharing and outreach with AEA365, etc.	Communication,Increased electronic presence
Better communication and services for members. More collaborative communications among members to share resources, ideas, strategies. I particularly find helpful the aea 365 posts.	Communication,Increased electronic presence
More dissemination of information re: evaluation practices, opportunities, concerns, etc. However, I primarily attribute this to AEA's increasing use of electronic media rather than the change in its governance model.	Communication,Increased electronic presence
more communication via email and the listserve	Communication,Increased electronic presence
more efforts to communicate using new media, such as the aea365 blog	Communication,Increased electronic presence
Increased membership, increased attendance at conferences, more people involved in leadership, votes on issues, more visible association through electronic means	Communication,Involvement/Engagement,Increased electronic presence
More involvement in social media, better communications with the membership (and engagement), increasingly professional tone, increased opportunities for learning about evaluation	Communication,Involvement/Engagement,Increased electronic presence
More communication regarding policy issues.	Communication,Policy
More frequent email communications, policy developed (posted, reviewed, revised, etc.).	Communication,Policy
Doing a better job of communicating new directions in evaluation e.g. evaluation policy George Grubb.	Communication,Policy
Better resource e.g. daily 365 tips + reference articles extremely useful	
better communications and training opportunities	Communication,Professional development
More people at the annual conferences and continued smooth registration process and conference - great adaptation by conference staff year after year!! Huge boom in social media and such, but I am a late late adopter ....	Conference
Not much except for the growth of AEA and the annual conference - when I first came to ENET (one of the AEA predecessors) the attendance was perhaps 200	Conference
Clearly defined differences in types of Annual Conference sessions.	Conference

structure of annual conference sessions - I really liked the longer and shorter session times during the conference day.	Conference
Bigger better more diverse presentations and better annual conference for my needs	Conference
More people attend annual conferences. Administration seems to be becoming more bureaucratic.	Conference,General negative
Many more professional development opportunities, which has been wonderful. Prior to that, the opportunities were essentially limited to the annual conference (which is cost prohibitive for many of us) and journals. The addition of things like aea365, the coffeee break webinars, the mini online courses have been hugely beneficial for me professionally.	Conference,Professional development
Greater emphasis on cultural and diversity issues	Div/Outreach
AEA is much larger and lot of diversity both in terms of participation by different groups and the the types of evaluation issues	Div/Outreach
Much more open and inclusive; more tangible benefits especially in last couple of years	Div/Outreach
An increased interest the international evaluation arena and international development evaluation.	Div/Outreach
More diversity and cultural sensitivity	Div/Outreach
AEA offers more to its members, including tipadays. It also seems to be doing more with recruiting new evaluators of color.	Div/Outreach
more openness to diversity	Div/Outreach
Broader participant base	Div/Outreach
More outreach	Div/Outreach
More outreach.	Div/Outreach
A greater focus on international matters	Div/Outreach
More information and services offered through website. More frequent communication via email.	electronic
more transparency in activities of Board; more public information on budget; more interest and involvement of new (and less visible) member	General comment/others
Susan Kistler's involvement/work load is much heavier, OR it's more visible. She is awesome in all she (and her team) does. (I think) we, the membership, have been asked for input on more documents than in the past, such as our involvement with the Fed as The go-to organization for evaluation as it relates to public policy.	General comment/others
1. active engagement of AEA Chair in TIG discussions; 2. wider transparency in Board electeion related matters; 3. increased attempts to get member participation in discussions on governance issues	General comment/others
Continuing to clarify critical issues related to evaluation practice	General comment/others
more focused on democratic themes	General comment/others
Explicit focus on developing information to inform US government about evaluation	General comment/others
Larger and more organized	General comment/others
education on policy-based governance.	General comment/others
better organized and more professional services and products. role addressing national policy issues	General comment/others
Lots of change, more active, more organized, better media coverage	General comment/others
It continues to get better organized thanks to great management.	General comment/others

there have been a burst of new TIGs and lots of discussion about changing governance structure.	General comment/others
AEA keeps growing larger. It is more politically conscious and active. It is seeking to expand in other directions as well-- seems to now be a relatively "wealthy" association.	General comment/others
While I have been active with the Quant TIG Leadership time for years and a member of the Finance PAT, the AEA is basically still the AEA with pretty good sessions and workshops. It ain't broke and saw little reason to mess around with it.	General comment/others
aea365 was added, more web/internet connections, more green, larger audience, VERY GOOD AT REMINDING US TO DO THINGS and therefore better able to ensure it is involving the membership on a regular basis.	General comment/others
Seems to be more organized and professionalizing.	General comment/others
I've just noticed how the conference grows (I only go every other year).	General comment/others
More solicitations for input from AEA Board/Leadership -- e.g., on line surveys, feedback instruments, suggestions for improvement, etc.	General comment/others
Introduction of workshops and it seems to me that there has been an increase in the number of coffee break talks.	General comment/others
organization is increasing membership, is working smoothly	General comment/others
Board presenting news ways of organizing/managing/leading AEA; new uses of technology for member involvement and outreach; new efforts to 'scan' environment	General comment/others
Communications with membership better through Listserves, TIG newsletters, AEA website was greatly improved with the library and other resources. More focus on professional development for practicing evaluators, more professional development opportunities(i.e. webinars). Excellent response from AEA office to inquiries. More focus on supporting new evaluators. More focus on improving the experiences and networking opportunities for AEA conference attendees. More involvement in policy advocacy.	General comment/others
Constitution and ByLaws of AEA were changed for the better.	General comment/others
It's getting larger - & more staff	General comment/others
More TIGs.	General comment/others
has gotten more professional and has developed good set of tools.	General comment/others
Have branched out in various directions.	General comment/others
The organization has grown and expanded its reach -	General comment/others
All I know about the change to policy-based governance is that it seems really important to a few insiders. I attended a session (I believe in Orlando) about the change to policy-based governance and the panelists mostly spoke to each other about how big a change it was to them. They made little attempt to explain the implications for the rest of us. As a board member of other non-profits, I understand the meaning of "policy-based governance." As a member of AEA, I experience policy-based governance as a vague concept that is supposed to be important to me. I see a gap between the inner circle and rank-and-file members.	General comment/others
AEA board has been more active externally.	General comment/others
It's getting bigger . . .still has a welcoming and 'family' feel but I recognize fewer people	General comment/others
Increasingly professional organization; more focus on policy issues; increased influence of practitioners and reduced influence of academics	General comment/others

conferences more interesting, better organized, more social activities, great web/internet resources like evaltalk and 365, Facebook	General comment/others
Confusion re: the committee structures & roles	General negative
On-line news and communication has growth considerably	General negative
Journal has become even more theory focused/less stimulating than before. ( I am an evaluation manager/professional)	
Members seem less involved in running the organization and in decision-making.	General negative
less communication about governance	General negative
Constitution & ByLaws were amended and all of the AEA officers and Board of Directors are now actively involved with the operations of AEA.	General negative
Just seems even more elitist	General negative
None...I still find it to be a closed group and it is extremely difficult to become an active part of the governance structure.	General negative
Less membership engagement. Board members no longer supposed to be involved in operations -- all turned over to the Management. Vague role of Board (seems to be on a cloud somewhere). Confusion on part of membership as to how they can be actively involved as volunteers in implementing activities, other than through TIGs.	General negative
I haven't been to AEA's annual conference since Orlando, but I did not like the location in Orlando at all. I was not able to stay at the conference hotel, and it was very inconvenient for people staying in nearby hotels. The shuttle buses must have cost AEA a fortune, and it took forever to get to your hotel if you were at the end of the loop. Future conference hotels should be located near a range of other hotels and activities.	General negative
It's getting awfully big - which has more minuses than pluses. The website and programmatic offering have expanded but the networking and personal feeling is rapidly going away.	General negative
There was some strange swearing in ceremony of new Board members at the last conference.	General negative
lack of clear leadership, lack of clear communication, lack of direction	General negative
A shift in ideology toward policy-based governance. Bylaws revision that erased the standing committee structure. Rhetoric of membership involvement absent any mechanisms for implementation. Excessive workloads for Board and PATs that seemingly goes nowhere.	General negative
More online activity.	Increased electronic presence
More advocacy for evaluation. Enhanced website. Webinars for continuing education.	Increased electronic presence
Introduction of AEA365 and coffee break webinars	Increased electronic presence
technical savvy has increased and online exposure	Increased electronic presence
much greater level of interaction by web	Increased electronic presence
The start of 365 site and	Increased electronic presence
Web site and e-based connection have been a fantastic addition!	Increased electronic presence
I receive more emails from them than previously.	Increased electronic presence

More effective in connecting with the members outside USA. Webinars and all the other web links for virtual discussions are fantastic.	Increased electronic presence
More web-based support systems including webinars.	Increased electronic presence
more accessibility to information and training via webinars	Increased electronic presence
I am aware of more online resources, including resources from conference presentations, "coffee break" webinars and the new longer lasting online learning opportunities.	Increased electronic presence
There seem to be a lot more opportunities to become involved, such as listserves, webinars, etc.	Increased electronic presence
Larger membership, much more web/social media presence, posting conference materials on website, refined conference session search function. webinars, enewsletter	Increased electronic presence
More on-line offerings, such as webinars. Conferences seem to have gotten bigger.	Increased electronic presence
Change in website	Increased electronic presence
more email/updates on policy-related issues	Increased electronic presence
Increase web offerings make this a wonderful group to participate with.	Increased electronic presence
Larger overall. Bigger web presence and emphasis on year-round learning.	Increased electronic presence
more frequent contact with members; more opportunity to engage with others through surveys and listservs	Increased electronic presence
More web-based / social media discussions, information, ability to learn	Increased electronic presence
More electronic information being shared with members	Increased electronic presence
More adept with social media, love those coffee break demonstrations	Increased electronic presence
More activity online, e.g., AEA365, etc.	Increased electronic presence
More e-mail reminders	Increased electronic presence
online web presence	Increased electronic presence
coffee breaks and 365	
more internet / technology based information	Increased electronic presence
addition of the data visualization TIG	
Membership has expanded and website content has improved. AEA growth has been wonderful to be a part of.	Increased electronic presence
the Linked In site	Increased electronic presence
Interactions of members via 365 and summary of other discussions	Increased electronic presence
I love the daily AEA 365 tips and minute learning!	Increased electronic presence

more social media opportunities (however, this is not something I generally make time for)	Increased electronic presence
more greening of the organization in terms of doing things electronically vs paper	
Providing more channels to express points of view and participation from members.	Increased electronic presence
More active in social media	Increased electronic presence
More information and options available electronically.	Increased electronic presence
Gwen Newman has sent bulletins.	Increased electronic presence
Coffee Break webinars	Increased electronic presence
More blogs and newsletters and things of that type	Increased electronic presence
Thank you for the Newsletter. This really makes a difference.	Increased electronic presence
Increased presence on the web and with AEA on the web, use of technology, sharing of information	Increased electronic presence
More use of technology at the conference	Increased electronic presence
More information on the website	
More use of social media and use of technology to communicated with members	
Increased activity in social networking and virtual forms of engaging members.	Increased electronic presence
improved web presence and "technical" (showing my age there) options such as the webinars, coffeetalk sessions, AEA365, etc.	Increased electronic presence
explosion of web content/activity	Increased electronic presence
Lots of more great info - especially through A365, webinars. Getting better and better.	Increased electronic presence
Expansion of web-based member services and informal educational services	Increased electronic presence
More opportunities for learning and sharing through web site additions - AEA 360 online library, etc. Increasing activity to include members in diverse ways; more attention to international members and relationships. However, I am not sure whether such changes are due to the governance change or to increasing efficiency and staff of AMC	Increased electronic presence
more outreach through the website	Increased electronic presence
more on web, etc	Increased electronic presence
Many more web based programming (e.g., AEA 365, Coffee Webinar, more informative AEA News Letter).	Increased electronic presence
Improved website. Better accessibility to pubs/articles.	Increased electronic presence
More webinars	Increased electronic presence

Use of improved technology available for bolstered website, online resources, webinars, etc. I have no comments on how board leadership has or has not changed or contributed to changes in programming - it's all behind the curtain for me.	Increased electronic presence
Increased number of resources for and to engage members-aea365,webinars, weekly digest- and with enhanced quality.	Increased electronic presence
There now seem to be more conduits to share information, specifically AEA365 and webinars.	Increased electronic presence
more high-tech, very very useful	Increased electronic presence
Better web more information and discussion going on	Increased electronic presence
The professionalism and all the additional resources available, especially the web and social media based services.	Increased electronic presence
More thorough and complete emails.	Increased electronic presence
Increased online training/webinar opportunities.	Increased electronic presence
- technology and online resources have exploded! very exciting  - structures and processes seem to be in place for things like TIG websites, emailing members, etc.	Increased electronic presence
much larger membership and bigger conferences; more services to members electronically	Increased electronic presence
AEA 365	Increased electronic presence
More web-based offerings, including 365	Increased electronic presence
Use of social networks	Increased electronic presence
greater use of the internet to provide services	Increased electronic presence
There is more web-based interaction and best practice sharing	Increased electronic presence
library of resources, coffee talk webinars, listserv	Increased electronic presence
Technology-enhanced offerings for information-sharing and continuing education	Increased electronic presence
I was unable to attend the 2010 annual conference so it is difficult to comment. I've noticed more emails and updates coming out progressively over time though!	Increased electronic presence
Susan Kistler's amazing online presence is very noticeable. I really appreciate the coffee break webinars, and the AEA 365 or whatever it's called. I also recently participated in the first multi-day online educational seminars.	Increased electronic presence
there's more email from HQ	Increased electronic presence
I'm not sure when this started, but greater use of internet options to communicate and network.	Increased electronic presence
better designed website and newsletter	Increased electronic presence

More useful services such as the weekly digest email	Increased electronic presence
Added webinars for students interested in pursuing graduate studies in evaluation. Have attended one.	Increased electronic presence
Increased openness to input/feedback, or solicitation of input from membership; increased social media presence.	Increased electronic presence, Div/Outreach
More engagement	Involvement/Engagement
Seems to be more outreach to members	Involvement/Engagement
- greater involvement with international evaluation - greater emphasis on qualitative research - more attention paid to appreciative inquiry	Involvement/Engagement
More opportunities to engage for shorter periods of time. More emphasis on utilization.	Involvement/Engagement
More letters from leadership.	Involvement/Engagement
Richer information sharing from the leadership to members	Involvement/Engagement
More focused discussions by the TIGs - better use of alternative methods of getting information and discussions out to members.	Involvement/Engagement
There is much more going on and more opportunities for member participation and for members to showcase their knowledge and skills.	Involvement/Engagement
There are more ways to be involved.	Involvement/Engagement
More invitations to participate in various ways.	Involvement/Engagement
The opportunity for daily interaction, not just occasional (through aea365)	Involvement/Engagement
More frequent information	Involvement/Engagement
More information, more interaction opportunities.	Involvement/Engagement
More invitations to participate in the association.	Involvement/Engagement
better newsletters	Involvement/Engagement
A lot more engagement in AEA's operations and work.	Involvement/Engagement, Activities
There are more options for involvement and education through technology. This allows ways to get more professional development which I appreciate. The newsletter, and the option to get the publications electronically seem new. Respect for the environment and ways to go green.	Involvement/Engagement, Activities, Professional development



Increased variety of opportunities for members to participate.	Involvement/Engagement,Policy
Completion of policy on cultural competency.	
Wide distribution of AEA policy statement re: evaluation and government	
"	
There certainly seem to be a lot more PD/networking opportunities for members than there used to be- esp in terms of AEA365, coffee breaks, and there was a book club at one point. One gets the sense that people are constantly trying out new ways to involve members.	Involvement/Engagement,Professional development
None	No change
None	No change
I haven't noticed any changes. I haven't been able to attend annual conferences due to budget constraints at my agency.	No change
None	No change
I am getting more email updates.	No change
Have not seen many changes	No change
no changes	No change
None	No change
Haven't been involved enough to know, just restarted my membership.	No change
None	No change
None	No change
I have not noticed changes	No change
nONE.	No change
none	No change
None	No change
Not any except the change in board	No change
none	No change
None	No change
None that I can think of	No change
I'm not sure I've noticed any. I do note that AEA is committed to member involvement and input and that the organization reaches out to members in many different ways over the entire calendar year.	No change
nothing significant	No change
none really, maybe more social media involvement	No change
none, but I'm not super involved.	No change
None	No change
too short of my experience to assess it.	No change
I have not noticed any changes.	No change
not sure	No change
None	No change
none	No change
I haven't been a member long enough to see change	No change
None	No change
none that I can think of	No change
not really been following it that closely since I have had very little work on could not afford to pay my membership fee.	No change
None, but I have been less involved for the last 10 years.	No change
I have not noticed anything.	No change
nothing much	No change
None	No change

Have not noticed any.	No change
none	No change
None really	No change
honestly I haven't really noticed anything but I haven't attended any conferences since 2009 so that might partly be why	No change
none	No change
not sure	No change
Not Much	No change
Nothing blatantly obvious.	No change
None - I do not feel I have been a member long enough to notice the changes as changes are slow going.	No change
None.	No change
None.	No change
None.	No change
None.	No change
none	No change
No change.	No change
None	No change
I don't think that I have been overly aware of changes. This is perhaps due to the extent of my involvement...perhaps too little.	No change
None.	No change
nothing specific	No change
none	No change
In my general connections to AEA, I have not noticed any real changes except the large growth in membership. As a PAT member I know about the shift to policy governance, but have not noticed that this has made any changes in AEA generally.	No change
Haven't noticed any, but I've been a very passive member of the past several years.	No change
I have not noticed any changes	No change
none	No change
none	No change
None, however, I'm not a good judge as my involvement is limited. I do know that notice of opportunities to be involved are limited -- recognizing that I could seek out those opportunities rather than wait on AEA to propose them.	No change
None	No change
None	No change
None	No change
Didn't really notice any	No change
none.	No change
I tend to be more active in AERA so this is a secondary organization for me. I haven't noticed anything.	No change
none	No change
None	No change
I have not noticed changes except for the attention to Green (environmental) concerns.	No change
None	No change
none	No change
None	No change
None	No change
none	No change

not much.	No change
none???	No change
none	No change
None.	No change
Honestly not much. I think I've become more involved in my own TIG, but the work I do there seems very removed from higher levels of leadership. I guess I've also noticed that there are more opportunities to participate such as aea365.	No change
None	No change
I retired 10 years ago and have not been active in AEA since I retired. I was very active before I retired. These questions don't appear to be relevant to members like me.	No change
no, nothing	No change
None	No change
None I am aware of.	No change
Not really. I do not know well about AEA policies or benefits.	No change
None-I am however not heavily involved.	No change
none	No change
none	No change
Sorry - none	No change
Not aware of changes.	No change
none	No change
None	No change
Probably not involved enough to notice changes	No change
Not much	No change
none	No change
none	No change
have not noticed any	No change
None	No change
I can only say that I noticed the vote for an AEA wide policy on cultural considerations in evaluation.	Policy
Susan Kistler sends around very good resources. More messages from the President. More opportunities to comment on policies.	Policy
Policy white paper, now working with CTSCs for similar issues	Policy
Only through Ad Hoc committee did I notice that we needed to speak to policy issues when making reports to board.	Policy
better use of internet based processes	Policy
stronger international orientation	
better appreciation of policy evaluation	
Increased focus on policy issues.	Policy
Broader membership that is less focused on academia.	
More efforts to influence federal evaluation policy	Policy
Development of the Evaluation Policy Task Force was a great idea	Policy
For the first time AEA had clear policies that governed the association that are updated on a regular basis and posted on the website where all can see.	Policy
many more e-updates; more info / resource sharing via listserve; updated/improved website; more requests for e-participation in voting, feedback on new policies/position papers, etc.	Policy

The change to policy government.	Policy
Haven't really noticed anything in terms of the conferences but it seems there is more coming from AEA that relates to policy and issues of policy than there was in the past.	Policy
Information supplied about policy and programs indicates that the agenda is somewhat more existentially lefty squishy.	Policy
Seems there are more announcements of useful activities on website.  There are more webinars  The listening project was initiated  The policy guidelines were announced	Policy, Activities
Increased opportunities to be involved, better use of ICT and social media, continued and increased efforts to have AEA's voice heard in important national issues pertaining to evaluation.	Policy, Activities, Increased electronic presence
More outreach to members, plus more intentional policy role. AEA's statement on effective policy in public sector context was super important....	Policy, Div/Outreach
board elections, improvement in management policy (diversity, participation), lots of interesting ways to keep members engaged and facilitation of tools for professional development	Policy, Professional development
Increased dissemination of information/ practice, including an increased number of opportunities for professional development; increased efforts to link members	Professional development
More online opportunities for ongoing professional development	Professional development
More effective efforts to provide bite-sized professional development options, predominantly online	Professional development
I've noticed the increase in web resources and professional development offered via AEA. I've noticed a rise in the role of the TIGs in the development and delivery of professional development to the field.	Professional development, Increased electronic presence
More opportunities for professional development (e.g., Coffee Break Webinars) and lots of great resources through aea365.	Professional development, Increased electronic presence
I haven't been paying close attention - but I guess more use of social media (which I like), more frequent newsletters, more professional development opportunities	Professional development, Increased electronic presence

*Appendix H. Member Comments in Response to "What suggestions do you have for improving AEA's governance?"*

<b>Member Comment (unedited)</b>	<b>Coded Category</b>
* More transparency * More proactive, authentic, meaningful engagement of members--especially committee/PAT volunteers (AEA infrastructure)--in change processes to reduce the need to backtrack/retrofit/clean-up as we are thankfully now doing with this change initiative. Takes more time on the frontend but is more robust and sustainably enriched on the backend! * More mindfulness re: what is likely to be trust-enhancing as opposed to trust-eroding. Perceptions and the resulting interpersonal impacts are real regardless of intentions and the actual truth-value.	Transparency
1. Develop new leaders 2. Board should capitalize on membership talents and skills 3. Build a strong knowledge base about the organizational governance among its members 4. Board should not totally depend on the AMC 5. Board should pay attention to association's finances and develop plans and strategies for sustaining long-term financial health of the association 6. Board should reach out to non-evaluation world, including policymakers at all levels of government	Inclusiveness, New leadership, Interdisciplinary/ Collaborative
Actually, I am quite satisfied, no improvement to talk of.	No improvement or satisfied currently
Again, since the governance structure is still being established, the board is limited in the progress that it can make. It would be ideal if decisions could be finalized in the next year so that the organization can get on a strong track again.	Inclusiveness, no improvement or satisfied currently
Again. AERA is my main affiliation and I am a member for the journals and to occasionally attend a national conference if it is nearby. It is fine for my purposes.	No improvement or satisfied currently
Am not aware of the previous one so cannot comment at all. I am an international member and have no idea what this means for me or how it benefits me. I do know that there are few avenues for internationals to run workshops and that AEA is primarily US focused (nothing wrong with that!). What I do admire is the information sharing - the tips, the journals and a very well run conference. I am a founding member of the South Asia Evaluation Association and learning and wanting to learn more about how AEA is so efficiently run.	No improvement or satisfied currently, Inclusiveness, International inclusiveness
Apply critical thinking to an analysis of the fit between PBG and a professional organization such as AEA. Stop treating Carver's model as the Bible. Resume standing committees to accomplish the business of the organization. Hold elected Board accountable for oversight of governance; don't place it all on Susan. Permit, don't discourage, healthy discussion and critique. Don't stifle conflicting views. Make sure you have meaningful roles for member involvement; don't just collect names and put them on "Advisory Groups" of 20-40 people. Actual work needs to get done.	Governance model, Diverse ideas
As a minimally to moderately engaged member, governance is far from my mind. If it weren't working, I'd know - but since it generally works, I'm not concerned.	No improvement or satisfied currently
As a young researcher in the field of training evaluation, i did not find neither, any opportunity to work for evaluation or any other learning opportunity. Away from USA, as a foreigner, with a desire to work for the Association i did not find any project or opportunity. According to AEA evaluation revolves around the societal development programs like Nutrition and health etc. Corporate sector training and its evaluation is completely neglected. AEA can initiate by developing a section for training and development evaluation inside corporate sector.	Inclusiveness, "Little Fish", International inclusiveness, Diverse ideas

As an independent consultant, I am alert to grants and contracts opportunities. They often entail some type of data collection, analysis, evaluation, etc. Their scope exceeds what my company can handle alone, but could work through partnering with AEA members with the needed expertise. It would help me to have a simple mechanism for getting the word to members.	Interdisciplinary/ Collaborative
as in many organizations, it seems that the core group, while friendly, seem to be less inclusive with regard to including or fostering new leadership - just a sense of this, can't say exactly.	Inclusiveness, New leadership
Be more available for membership to contact you.	Outreach
Be more mindful of the differences in roles and contributions of the "big fish" versus the 'little fish' in the evaluation pond. The needs of us small evaluation houses may be more practical and less theoretical than universities that have evaluation centers and phalanxes of grad students .	Inclusiveness, "Little Fish"
Being an overseas member, from afar see that the governing processes are transparent, accountable and re[resentative by and large for the key membership audience that is USA resident members. This is natural and i do not consider this siytuation as an aberation or an anamoly. for my self coming from a developing country, i would wish to have more means of interaction with other learned members promarily to test my ideas, projects, notions, and also the opportunity to contact potential professional mentors on various topical themes. this would enable me to widen my horizons and also to see beyond the narrow precincts of evaluation as practiced in our countries (re. governance, deceieon making, etc.).	Inclusiveness, International inclusiveness
Better strategic linkages with other professional associations - e.g. the link between evaluators and I/O psychologists is extremely weak. To have real social impact these two professions need to work much, much more closely together. This linkage has to start at the level of professional associations. Evaluators need to be linked to other professions as well, in addition to the profession they may have grown up in before moving to evaluation.	Interdisciplinary/ Collaborative
Can't think of any.	No improvement or satisfied currently
Come out from behind the all surveys and talk to us worker bees. Maybe board members could visit TIG meetings and learn about the concerns of the common people. Maybe they could reach out in sessions and engage others of us as partners (rather than audience members).	Outreach
continue to be committed to embodying the principles and best practices of the field.	No improvement or satisfied currently
Continue to reflect and seek member input	No improvement or satisfied currently
Continue to use the Policy Governance model!	No improvement or satisfied currently, Governance model
Do not know enough to comment	No improvement or satisfied currently
Don't follow AEA governance too closely. Saw some emails but not much. Did not attend 2009 or 2010 annual meetings.	No improvement or satisfied currently

Don't say that things are "surveys" -- such as Jim Rugh's recent "survey" concerning international involvement when they are NOT surveys, but rather brainstorming or focus group-type exercises. This is embarrassing to an organization that should know what an unbiased "survey" looks like!! If AEA leadership has made a decision about a future direction, say that and ask for input on details. Also, if AEA has a policy-based model of governance the LEADERSHIP, not the membership, should be proposing policy. Propose a policy and then ask for member input before making it final or implementing it. In my opinion the whole international involvement "listening" or feedback effort has been flubbed and gives me NO CONFIDENCE that the Board knows what it is doing in relation to "policy-based" governance!!	Governance model, Inclusiveness, no improvement or satisfied currently
Ease off. The members and the profession are not much influenced by AEA. Just hang in there.	Inclusiveness, no improvement or satisfied currently
Easier access to your site and the less need for passwords.	Inclusiveness, no improvement or satisfied currently
Educate the members more about how it is governed and the recent changes...What is policy-based governance? What was in place before? Why was this change made?	Transparency, Governance model
engage members who are not know to other memebers	Inclusiveness, "Little Fish", Interdisciplinary/Collaborative
Expand board to include diverse set of members, young evaluators all the way to ancient evaluators from health to education to business to other fields.	Inclusiveness, New leadership, Interdisciplinary/Collaborative
Expand leadership positions to more members and aggressively recruit participation.	Inclusiveness, New leadership
Find ways to allow members, including early professionals, to get more involved in governance and leadership.	Inclusiveness, New leadership
Find ways to inform members about what it is.	Transparency

First of all, I think AEA's governance should take into account the interests of issues International members may consider of paramount importance for them, Such issues and problems might include alternative theoretical visions or approaches to evaluation which may be of interest to many AEA members. For example, over the last three decades I have been working on an integrated, critical, and pluralistic vision of evaluation that strongly contrasts with the positivistic, conventional, view used by most American researchers and evaluators, despite the advances achieved by many qualitative approaches now being used. This integration not only refers to methods, but also to the philosophical principles such a vision rests on. I would like to discuss this view with some of my colleagues at AEA. Another issue I think AEA's governance should consider has to do with the convenience of exploring the possibility of making AEA a multilingual association, so that international member from countries whose native language is not English be able to participate in meetings and annual conventions without the anxiety-producing situation of being misunderstood in their oral presentation and discussions, which demand a perfect domain of the English language. In my case, for example, as a doctoral graduate from UCLA --Dr. Marvin Alkin was my dissertation adviser--, I had no major problems with my written English, and according to my professors I had the privilege to study with, it was "outstanding". However, I would be very anxious if I were to make an oral presentation at an international AEA meeting, since in all the activities I carry out in my daily life in my country (Venezuela) the language I use is Spanish. Finally, I wish to thank you for giving me the opportunity, through this survey, to make these suggestions, which I consider of great importance for increasing the international projection and prestige of AEA.	Inclusiveness, International inclusiveness
Focus on helping more new evaluators and those situated in practice to find a place in the organization.	Inclusiveness, "Little Fish"
For those who are practicing evaluators who may not be educators or perceived as scholars should be recognized for their work. It often seems to publish an article in New Directions or to win an AEA award if you are not perceived as a scholar your chances are slim to none.	Inclusiveness, "Little Fish"
Getting big-boy pants on and requiring an academic credential in Evaluation, and/or a certification for membership status. It is offensive as hell when payment of dues constitutes the awarding of the title evaluator.	Inclusiveness, no improvement or satisfied currently
Governance is not much of a problem as I see it	No improvement or satisfied currently
Hard to give input when I don't know what it is .....	No improvement or satisfied currently
Hard to know, I think it's a well-run organization but I have no real knowledge.	No improvement or satisfied currently
have a short fact sheet for what you do, who the members are, etc.	Transparency
having some regional representative who communicates, share, and promotes might help.	Transparency, Outreach
Hmm, thinking about my "Not Sure" responses, it may be that I haven't stayed current on what's reported to the membership. But, if you haven't, it could be helpful to provide a primer on what the leadership sees as having changed since 09, including their attitudes and perceptions of those changes.	No improvement or satisfied currently, Transparency
I am not a good person to judge governance. I haven't been involved or motivated to do so.	No improvement or satisfied currently



I am not able to be too involved so I am uncertain what might best improve governance	No improvement or satisfied currently
I am not familiar with any aspect of AEA governance. Sorry.	No improvement or satisfied currently
I am not sure. To what extent do I as a member need to be aware of the governance outside of how the association's meeting and programs are held. I think ongoing simple communications can help with transparency.	No improvement or satisfied currently, Transparency
I am still learning about it.	No improvement or satisfied currently
I believe when a member joins, there should be an automatic screen which appears which invites them to learn about AEA governance. So they are informed as they join. I have occasionally voted on officers, but in general not. I am interested in the policy group's work, but have not followed it closely. Could there be incentives for involvements, such as decreased fees?	Transparency
I can't say until I increase my involvement, which I would like to do	No improvement or satisfied currently
I do believe that more opportunities need to be created to build capacity among AEA members to better understand the way in which the organization is governed. When I served on the Diversity Committee, prior to the move to policy-based governance, I learned how the organization operated. I was disappointed to learn that incoming presidents had only one appointment to the then standing committees. I advocated for at least two new appointments to allow for opportunities to appoint more people of color or newer members to build leadership capacity. I still believe there should be more opportunities for presidential appointment of members to serve on committees that cross borders with the AEA structures (TIG memberships do not do this), so more people feel connected and capable of running for leadership positions.	Inclusiveness, New leadership, Transparency
I do not know enough to make suggestions.	No improvement or satisfied currently
I do not know it very well yet in order to make a concrete proposal.	No improvement or satisfied currently
I don't have suggestions for this.	No improvement or satisfied currently
I don't know enough about its governance to say.	No improvement or satisfied currently
I don't know enough to suggest any.	No improvement or satisfied currently
I don't think I know enough about it to be able to make suggestions. Sorry.	No improvement or satisfied currently
I guess more transparency of what is going on there. Maybe the info is out there and I've missed it, but I feel like I know little about what has been going on the governing board.	Transparency

I have always perceived AEA to be fairly 'clique-ish' with only those individuals connected to big names such as Len Bickman, Debrah Rog, Mark Lipsey, Micheal Quinn-Patton, being able to access the inner circles. More recently, I've noticed that the group seems to have widened a bit--but still only represents those that have books with substantial circulation. Those of us that are 'commoners' don't much connection to the actual organization. I only recently re-joined because I presented at the annual conference, but still noticed that the organization seemed very 'publicity' oriented and only promoted those that were well-connected.	Inclusiveness, "Little Fish"
I have no idea	No improvement or satisfied currently
I have no suggestions at this time.	No improvement or satisfied currently
i have not attended to the governance aspects of the organization and my membership has been based on my need to learn more about strategies and movements occurring in the program management and accountability field of evaluation although that is only one of many hats i wear in my management position	No improvement or satisfied currently
I have very little awareness of AEA's governance. I would suggest webinars on the subject or at leave an AEA Coffee Break webinar to provide an overview. If this has been done, I must have missed it.	No improvement or satisfied currently, Transparency
I haven't been around enough or paid enough attention in the last 2 years to really know what's going on with AEA's governance.	No improvement or satisfied currently
I know nothing about it.	No improvement or satisfied currently
I need to get more involved to provide an opinion.	No improvement or satisfied currently
I only joined in 2009 so I have checked all as "not sure". I don't think I'm in a position to answer these questions. And with respect to question 14 below - I've checked "no" I was not officially aware - but nonetheless I'm aware of efforts to move in this direction from my reading of your web-site.	No improvement or satisfied currently
I really don't have any. I do think, however, as evaluators if the AEA's Board of Directors follow the same sort of standards and code of ethics set forth by the Association for evaluators in guiding their work, behaviour and standard of work there shouldn't be any or few issues.	No improvement or satisfied currently
I tend to feel a bit too much gets made of the governance issues. I'm less concerned that the board be accountable, equitable, fair, transparent than I am that the association provide quality learning opportunities and good journals.	Inclusiveness, no improvement or satisfied currently

<p>I think AEA has good intentions to be all the things these questions ask. I recall that when I came on the Board it was a revelation to discover so many volunteers and so many activities going on. When I left the Board we had transitioned to Policy Based Governance. What I know is what is in the newsletter and so I know some things but likely not everything. I trust our leaders and I have complete trust the they will do everything in their power to assure the vitality of AEA. As for improving? Keep reporting what is going on to members. The International Listening Project is important. What is happening with the Guiding Principles which are up for review? The cultural competence statement is approved. Congratulations..a lot of work went into that! Keep taking on these difficult types of issues. I wish you would correct what I was told was a typo..we are "ethically responsible", the words ethically defensible do not connote the proactive stance that ethically responsible connotes. I honestly think that the Board itself, with self-reflection, can likely answer these questions and determine where to go with our Policy Based Governance model. I believe most associations in disciplines we have hailed from have Ethics as an identifiable part of an organization. The Values PAT..is a mystery to me or I've missed how they will meld awards, diversity and ethics, what they take on as it is not an easy blend (I would fault myself for not knowing, which is why I did not respond to the query. I'll try and keep my ears open through the newer social media mechanisms...but it's not always easy). As long as you are listening...one thing that is important is to demonstrate our value. We have been enjoying a period where evaluation is being done, where decisions ostensibly are to be based on evidence, but we have economic problems and if they get severe enough our desire to use evaluation for social betterment could be endangered. Sorry to rant on...But I like the question and I'm sorry that I have not sufficiently reflected on it. I'm likely not alone. But I will think about it and I appreciate the concern.</p>	Transparency, Inclusiveness, Diverse ideas
I think it is going to go the direction that leaders want it to go, rather than the direction that the majority of members want it to go...	Inclusiveness, "Little Fish", Diverse ideas
I think it's a great organizations and don't have suggestions for improvement	No improvement or satisfied currently
I think the forward thinking and progressive approach seems to be moving in a positive direction.	No improvement or satisfied currently
I wish there were more short-term opportunities for involvement - which goes contrary to the nature of "involvement" of course - I guess I'd like to say I wish I had more time be involved at a greater extent.	Inclusiveness, no improvement or satisfied currently
I would need to understand more about the current approach to governance.	No improvement or satisfied currently
I'm confused about what decisions are made where -- overall board vs. committee vs. by membership vote vs. by staff (are there staff?). I think AEA provides alot of learning opportunities for members. It does better than any other association to which I belong in keeping members in the loop, but I still can't say I understand how it works.	No improvement or satisfied currently
If you are moving to a PG Model an org like AEA should use John or Marian in a year long process	Governance model
In an organization that is getting as large as AEA is, this would be hard. Only a relatively small group is close enough to the governance structure to be able to "touch" it; the rest of us are more than "arms length." There are turns that the organization has made that I truly wonder if the larger membership were in sync with, i.e. the push to greater international involvement works for university people (or some university people, but is absolutely worthless to most of the rest of us - and the focus on it retracts from what else might be available to us.	Inclusiveness, "Little Fish"

Increase the outreach to regional groups in person. Building relationships and trust is critical to changing the perceptions surrounded the problems AEA has been experiencing.	Outreach
Invite in thought leaders from other fields to engage in the leadership of AEA.	Interdisciplinary/ Collaborative
Involve more members involved in international work - include leaders that will enable AEA to extend the scope of strategic evaluation learning beyond the borders of the USA.	Inclusiveness, International inclusiveness
It occurs to me as I complete this survey that I don't know how often the board meets, how it determines priorities, or monitors implementation. It may be that this information has been provided and I haven't paid attention to it.	No improvement or satisfied currently
Keep it simple, usually complexity and number of people have inverse relationships to progress. (Often exponentially...)	Inclusiveness, no improvement or satisfied currently
Keep members informed of what is being done and don't expect perfection. Keep moving forward.	Transparency
Keep the governing documents easily available, remind members where to find them from time to time, and then leave it to the members to take some responsibility for their own education,	Transparency
maintain and enhance transparency and member engagement	Transparency
Make better use of ad-hoc subcommittees around important priorities/issues.	Inclusiveness, no improvement or satisfied currently
Make me care about it? Why should I care about governance as long as fiduciary responsibilities are handled correctly and I continue to get my benefits from being a member. I would need to know why I should be involved in governance - what is policy-based governance?	Transparency
Make more efforts to actively bring on board individuals who are interested in serving the organization, rather than keeping it a fairly "closed" structure.	Inclusiveness, New leadership
More diversity in representation (e.g., more non-academic members, more diversity of eval fields/foci).	Inclusiveness, Diverse ideas
More webinars to participate in decisionmaking and issues	Transparency
Obviously, as answered above, I do not know about governance even though I have been a member for so long. I don't feel in a position to respond, except to say that perhaps you could do an annual report describing the basics of governance and news from the past year.	No improvement or satisfied currently
Obviously, I am not sufficiently familiar with the nuances to suggest anything. I am not a picky person and was always satisfied with the organization. I lack funds to attend conferences so I suspect I missed a lot of clamor on governance.	No improvement or satisfied currently, Transparency
On line reporting of governance activities to members.	Transparency
on policy matters reflect views that diverge from the majority.	Inclusiveness, Diverse ideas
Open it up.	Transparency
Overall I am very happy with AEA. The access to resources, networking opportunities, training, and articles is great, especially as a relatively new evaluator. The areas I could see improvement would be local affiliate engagement. Trainings/professional development, social networking, etc. appears to be guided primarily by the local affiliate in my area. As I understand the current governance of my local affiliate, we are very interested in more direct engagement with AEA.	No improvement or satisfied currently, Outreach

Perhaps publicizing the process, efforts, etc. a bit more through the weekly e-newsletters, the blog, etc. in small, quickly digestible chunks of information	Transparency
Perhaps share the basic model with its members	Transparency
Plenty of words have been shared via the website and other venues. As an individual member, it's still not clear to me how this has been helpful. The "apparent" change of increased transparency may be due to more information being available via all these new (excellent) avenues for sharing.	Inclusiveness, No improvement or satisfied currently
Provide additional opportunities for knowledge of governance outside of annual meetings.	Transparency
provide all members with a one pager on AEA structure and governance and dedicated web pages for more detail	Transparency
Provide more information about exactly what the governance does.	Transparency
Remember that the vast majority of members will not want to play an active role - those who do should be clear on their mandate and then get on with it.	Inclusiveness, No improvement or satisfied currently
see previous comments	
Seems like I used to read about governance before and haven't for a long time. The newsletter has too much, so I quit reading it.	Inclusiveness, No improvement or satisfied currently
Since I do not know very much about AEA's governance, I have not suggestions.	No improvement or satisfied currently
Since I have only been a member for a short time, I cannot contribute to this question.	No improvement or satisfied currently
Since I haven't made the effort to really know much about this, I can't suggest anything. I believe all the information I might need is available.	No improvement or satisfied currently
Stronger use of TIG networks	Inclusiveness, No improvement or satisfied currently
Take an evidence based approach to its governance issues. It adopted the Carver Model despite the considerable literature on its problems within the not-for-profit sectors.	Governance model
Tell people election scores! It is shameful that AEA doesn't share the actual votes/percentages for candidates for the AEA Board. They might as well hand pick the Board if they don't share the actual results with membership. Ridiculous!	Transparency
The AEA should think about the members outside of United States. We from Africa really get a raw deal despite our efforts to popularise the Association here. Rarely do we get effective representation especially from the continent who can articulate issues facing evaluators in Africa. I take it that we operate in different environments and cultures and therefore the Association should look at means of having representation from this part of the world, by that way it will enhance effectiveness and reflect an image of global organization.	Inclusiveness, International inclusiveness

The emerging image is of a Board that only deals with high-level (and somewhat vague) POLICIES, and has turned over ALL responsibilities for operations to its hired Executive Director and her (rather small) Management Team. Though Susan is remarkably well organized and efficient, there are many dangers in this model. One is the risk: what would happen if she got hit by a bus? The other is that there's a bottleneck: any operations, including volunteer activities, task forces, etc. all have to go through her. Another is that the Carver Governance Model is not applicable to a membership organization. AEA is becoming like many NGOs -- its 'members' are really perceived as 'donor units'. We're losing the sense of real ownership by members and their active engagement in functions. As was proposed during the leaders' retreat in Atlanta last June, there is need for a 3rd structure -- an ombudsman/GAO/watchdog-type function that is independent from both the Board and Management, that will represent the membership in providing oversight (and accountability) to the other two branches of AEA's structure. (Reference the way the US Constitution set up 3 separate structures of the USG, with this proposed 3rd structure somewhat (but not directly) analogous to the Supreme Court.)	Governance model
think they do a good job	No improvement or satisfied currently
this "governance" seems like a pretty esoteric topic ..... I am having a challenge in seeing the value of this survey ....	Inclusiveness, No improvement or satisfied currently
This survey is a start. I'd love to see more of a connection between AEA leadership and the TIGs. As the co-chair of the largest TIG, I was expecting that I would also be involved in meetings with other TIG leaders and possibly with AEA leadership. That hasn't happened. It's as if the TIGs could be separate entities altogether -- there really does not appear to be much strategic use of the TIGs.	Interdisciplinary/Collaborative
To improve transparency and awareness, how about a slide show or video that gives an overview of how AEA is governed now? There could be a separate piece for those interested in how it has changed. I'm not really interested in the change per se.	Transparency
Too beaucroatic! keep it simple and pragmatic. Most of us work in the REAL world...not the world of research and pedantics.	Inclusiveness, "Little Fish"
transparency would be a good start. Streamlining some of the processes, or clarifying procedures. Moratorium on new TIGs.	Transparency
Try not to get swallowed up by the social issues at the moment. Rather focus on good and unbiased evaluation. I have noticed a trend to organizationally take a stand on political and social issues that do not represent ALL members and are not all well founded. We should encourage sound unbiased evaluation of these issues rather than take a stand for or against. We are NOT a political organization. By avoiding taking a stand but encouraging sound evaluations we would not show leanings toward either side of the spectrum and attract more members rather than be seen as leaning one way or the other.	Inclusiveness, No improvement or satisfied currently
Try to incorporate other views and mindsets- Much of AEA seems to reproduce the same ideas and thinking- Much is happening related to emerging theories of evaluation, research, and systems - however AEA seems to promote the same notions from the past- The governance should reflect a more innovative and vibrant mindset - that takes the association to new levels	Inclusiveness, Diverse ideas

Well, this survey has encouraged me to become more familiar with AEA's governance.	Inclusiveness, No improvement or satisfied currently
When an organization is doing a good job, attention to its internal governance procedures is not a high priority to members like myself. I have not had problems or concerns.	No improvement or satisfied currently
Would like to know AEA's strategy for implementing its new policy. I see changes, but do not understand how policy is being implemented.	Transparency
Would like to see representation from the public, private, non-profit, and academic sectors on the Governing Board. Would like to see more activities by AEA's Board to be available for those of us not at the traditional places (Universities, large academic institutions, Gov't) etc. in order to get more opportunities, networking, collaborative activities, collaborative publishing, mentoring, etc. to those of us who are small organizations. Since we are not necessarily a "regular spoke in the wheel", we miss on opportunities because the AEA Board normally interfaces with large academic or large research/non-profit institutions. So a policy to include "underrepresented groups/sectors/organizations" would be very beneficial to all. Ex: NSF has a policy to include or award projects that have "underrepresented" groups as part of a STEM project (women, minorities, rural, Tribal, etc. populations). It would bring diversity and depth to the ideas, strategic direction, and activities of AEA.	Inclusiveness, "Little Fish", New leadership
You could be closer to Brazilian reality and problems.	Inclusiveness, International inclusiveness

*Appendix I. Other Relevant Uncategorized Key Informant Comments*

*"Our association has gotten big enough and complicated enough that we needed this"*

*"It's been a paradox, you want more member engagement, but that slows things down. That becomes a value trade-off. It's frustrating"*

*"In an aspirational sense, I understand what the transition is supposed to do, and what the desire is. Has it actually happened yet? I don't think it has"*

*"The time commitment increased for board members, but I'm unsure if more has been accomplished. That's an open question"*

*"I think we are done transitioning. We are in it...No more transition, but it is a living thing"*

*"I didn't receive a copy of Carver's book, but I'm sure that the original group [of board members did]...I would have benefited more from having the consultant there longer. It could have been like class going back and forth. I wish we had done it a bit more"*

*"There is a perception that policy-based governance has caused AEA to spend more money. It's not PBG that has raised our budget. It's the fact that the board has decided it's wanted more programs. We are great financial shape—fantastic. The board has decided to spend more money. This could have happened under the old governance structure or the new structure. There is no correlation between spending and PBG"*

*"I don't want the AMC to end up with accountability, but no authority"*

*"I love this association. I loved it before and I do now. I called these the dark years"*

*"There is historical base for AEA being financially conservative. This was due to history with an AMC and the 1989 AEA conference and the conference had a minor version held. There was no power and a smaller version of the conference occurred. The President decided to refund the registration fees and this almost took down the organization. That is a historical event that affected our policies. Back then policy was not something we talked a lot about"*

*"We need a pipeline and always need new leaders trained and one of the purposes [of committees] is to provide leadership opportunities. I think it's written somewhere. Many stable, long-term organizations are dedicated to building leadership from within"*

*"There have been a lot of alleged affects on both sides. There are some people who clearly thought we were very inefficient with too many volunteers involved in governance kinds of things. There are also a lot of individuals who have been very active in AEA and put a lot of time into AEA who are very skeptical of this whole process"*

*"It's a relatively low investment to be a part of AEA"*

*"When we first started we knew everyone, but it's changed. [AEA] needed to move beyond the mom and pop ways of management. This changed the tone and character of the organization, but growing the organization. We were bogged down in this minutia as we grew past a certain point"*



*"If you look back, all the presidents have been academic, but what will happen, looking over the trend-lines, we have people who can't give up client work. Therefore, you have all the academics as the ones that can be involved"*

*"Members come from different fields and disciplines, it is not an organization of all internal auditors or other common field. They all don't share the same knowledge base. They wrestle with defining themselves as an amorphous organization. There are few comparable organizations out there. It almost as if the organization is a collective of people sharing a common interest, it hard to say what else they share"*

*"One, it was clear that I was going to fight...there was an attempt to silence me...it was like playing in the sandbox...using parliamentary procedures to stop me. Attempts to get a vote over on me, they shot themselves in the foot. It drained me, it was 3 years of being drained...I never felt that much lack of integrity in my life"*