

# REPORT ON AMERICAN EVALUATION ASSOCIATION'S TOPICAL INTEREST GROUP STRUCTURE

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Committee

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# AEA Topical Interest Group Structure

## BACKGROUND

Within large professional associations, smaller “interest groups” have become the standard mechanism for ensuring closer and greater collaboration, information exchange, professional development, and networking among members. Although the formal literature is sparse, professional association development and management companies frequently view addressing the developmental and structural needs of these interest groups as critical to maintaining and growing a healthy association.

While AEA, today, is considerably smaller than many professional associations (with 5,600 members in 2007), it has grown over the past five years and is expected to grow more rapidly in the future. With that growth comes the increased likelihood of dependence on “interest groups” or this intermediate layer within the organization as a way to engage, serve, and retain an active membership.

Growth in the number of AEA’s Topical Interest Groups (TIGs) has mirrored growth in the organization as a whole; from 30 TIGs in 2001 to 35 in 2004 to 41 today. AEA members are permitted to join up to 5 TIGs; and recent data from the internal scan of AEA membership conducted by Goodman Research Group the internal scan (pg 20) show 54% of AEA members belong to at least one TIG. But TIG membership varies widely, from 83 to 1,273, and there is anecdotal evidence that the level of activity, benefits, services, and structure of the TIGs varies as well. Perhaps reflecting this disparity across TIGs, only 24% of the scan respondents rated TIGs as a “very useful resource,” among the lowest ratings given to an AEA service or resource (p 21). Qualitative data gathered from the scan process indicated that some respondents would like to be more meaningfully involved in their TIGs; and so opportunities exist for TIG improvement.

Given the rapid growth in both AEA and the number of TIGs, in Fall 2007, the Membership Committee undertook a rapid assessment of TIGs to (a) identify: current TIG practices, opinions and preferences of TIG leadership regarding the current operation of their TIG, (b) examine the practices of other professional organizations with regards to their own interest groups, and (c) offer recommendations for change. Central to this assessment effort were a survey of the TIG leadership and a literature review of practices of 5 other professional associations.

## METHOD

An on-line survey was developed and implemented with leaders of the 41 TIGs. The survey items were based on discussions among Membership Committee members and the initial charge from the AEA Board, supplemented by a modest literature review. Additionally, survey items were guided by key informant interviews with other professional associations and with the leadership of selected TIGs that were deemed most “active.” The on-line survey was developed in January 2008, piloted with 6 former TIG leaders, finalized in February 2008, and sent by e-mail to the respondents in March 2008. Reminders

were sent to all respondents 2 and 4 weeks after distribution of the survey. A copy of the final survey and summary of the aggregate results is provided in Appendix A.

The intended respondents were the 2007 chair(s) and program chair(s) of all TIGs. These respondents were identified from lists provided by AEA. Because some TIGs had the same individual serving in both roles while others had co-chairs for each role, the number of potential respondents for a given TIG could vary from one to four. Because of this disparity in number of potential respondents, the data were weighted before analysis.

In addition, as part of the review of AEA's TIG structure, the Membership Committee examined the TIG structure of five other professional associations in related fields:

- American Sociological Association (ASA)
- American Anthropological Association (AAA)
- American Psychological Association (APA)
- American Educational Research Association (AERA)
- American Public Health Association (APHA)

These five were selected primarily because information on their interest group structure could be found either on their website or through a known key informant. In addition, these associations are also known to be the primary or secondary professional home of many AEA members. The reviews gathered information on: (a) association and annual conference size, (b) types of interest groups, (c) process for obtaining recognition as an interest group, (d) membership fees/dues for interest groups, and (d) various dimensions of interest group structure. A detailed listing of these findings is provided in Appendix B.

## SURVEY RESULTS

The respondent pool encompassed 115 respondents. Of these, 73 agreed to participate, but 5 of these did not respond at all, 3 answered only the open-ended questions, and 1 failed to indicate their TIG (information needed to appropriately weight cases.)

As a result, 64 of the 115 respondents were included in the quantitative survey analysis (56% response rate), while 68 were included in the qualitative analysis (59% response rate). But, collectively, these respondents represented 36 of the 41 TIGs (88% response rate).

Because the number of respondents from a single TIG ranged from 1 to 3, responses were weighted to ensure that each TIGs' "voice" was equally represented. For example, if three respondents from the same TIG completed the survey, each of their responses was weighted by a third.

### Summary of Closed-Ended Survey Questions

Of the respondents, 37% indicated they were the chair or co-chair, 55% indicated they were the program chair or program co-chair, and 8% indicated they served in both roles.

**General Attitudes Regarding Their TIG:** We asked respondents to agree/disagree with a series of statements on levels of involvement in their TIG.

- Respondents seem to feel positively about their TIG and the level of involvement, especially as it concerns review of proposals. In fact, over one-half of the TIG leaders “agreed” or “strongly agreed” with the following statements:
  - o Overall, I would say my TIG is operating well (76%)
  - o My TIG membership is very active in review of proposals (59%)
  - o My TIG leadership is very active in review of proposals (99%)
  - o We take steps to actively promote new membership in our TIG (59%)
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- On the other hand, only a small percentage of the TIG leaders (22%) “agreed” or “strongly agreed” that “My TIG does lots of activities besides review of papers for the conference.” Further, 25% “disagreed” and 46% were “neutral” that “our TIG is more active than most TIGs in AEA”.

**TIG Services & Benefits:** We asked the TIG leaders to indicate if their TIG offered each of a series of services and benefits. Almost all TIGs said they usually hold a business meeting. On average, 29 people attended TIG business meetings at the 2007 conference, with a range of 5 to 100. Only about one-third usually hold a social gathering of some kind.

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In terms of other services offered, one-third or more of TIGs offered to “some degree” or “great degree” including::

- o electronic discussion list (47%)
- o Website (45%)
- o e-newsletter (37%)
- o Identification of useful resources (53%)
- The least common services offered by the TIGs were:
  - o Blog (0%)
  - o Hardcopy newsletter (10%)
  - o Awards (17%)
  - o ID of job or fellowship postings (18%)
  - o Mentoring/Support for Members (23.2%)
- Other services offered by specific TIGs were:
  - o Field trips at annual conference
  - o Co-development of a *New Directions in Evaluation* issue
  - o Facilitation of a discussion group on TIG goals
  - o Silent auction
  - o TIG Awards
  - o Table at information fair
  - o Keynote speaker at TIG business meeting

**TIG Size:** We asked respondents for their opinion on the size of their TIG: .

- A little under half (45%) thought their TIG was the right size
- More than one-third (41%) wished it were bigger.
- 2/3 or more thought it was ok for TIGs to be too small or too large
- But only about 40% thought AEA should restrict the number of TIGs or consolidate some TIGs (42% and 43%, respectively)

**TIG Proposal Review:** We asked respondents to indicate who reviewed proposals for their TIG and to agree/disagree with a series of statements related to quality of proposals and proposal review. Results indicated that:

- 2/3 of respondents said they recruit TIG members to review proposals
- for 6% of TIGs, only the leadership reviews proposals
- about 56% felt their membership was very active in review of proposals
- and only 8% felt it was hard to get members to review proposals
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- Most respondents seemed satisfied with the quality of their proposals. Eighty-six percent thought the review process was high quality and 69% thought the same of the proposals themselves. Very few felt they got too many proposals to review effectively or accepted proposals that did not fit their topical interest

**TIG Elections & Leadership Terms:** We asked respondents to indicate the manner in which TIG officers were elected and how long they served:

- Almost two-thirds (63%) elect their leaders, and 2/3 of those do so at the business meeting.
- Other choices—volunteers and solicitation by current TIG leadership—each attracted about 15%.
- About 40 percent of TIGs had set terms (about evenly divided among 1, 2, and 3-year terms); while one-third have leaders who serve as long as they are willing
- On average, respondents reported 5 people participated in TIG leadership in 2007, with a range of 1 to 20. However, according to the 2007 Conference Bulletin, an average of 3 people participated in TIG Leadership, with a range of 1 to 5.

**TIG Funding:** We asked respondents to indicate how their TIG activities were funded.

- Two-thirds (67%) were aware of the annual \$300 conference stipend and used some or all of their stipend in 2007
- And more than one-half (53%) of the TIG leaders reported that they do not need (additional) funding for their TIG activities
- In addition to the stipend,
  - o 22% get donated or in-kind services
  - o 11% get donations from foundations or other sources
  - o 7% get donations from members
  - o 11% get support via office reimbursements, external funding, donated web space, and other donors.

**Leadership Attitudes Regarding Overlap Among TIGs:** We asked respondents to respond to 6 statements related to perceived overlap among the areas of interest of TIGs.

- Most respondents see overlap with other TIGs in their areas of interest, but very few seem to think this is a problem.
- 66% think their TIG topical interest overlaps with at least one other TIG
- But only 30% thought the overlap caused confusion among members, and 22% thought it hurt their TIG.
- In fact, 63% thought the overlap promoted collaboration

**Leadership Attitudes Regarding Support for TIG Governance and Structure Modifications:**

We asked respondents to agree/disagree with a series of potential modifications in TIG structure and governance.

- With one exception, there was little support for the any of the proposed changes in TIG governance or structure
- The exception: Almost two-thirds (65%) agreed AEA should require TIG elections on periodic basis.
- In terms of other proposed modifications:
  - o Only 32% thought AEA should ensure comparable benefits among TIGs.
  - o Only 38% thought AEA should set a size threshold.
  - o Only 32% thought conference slots should be related to TIG membership.
  - o Only 19% want TIGs to be able to set or collect dues, and almost half “disagreed” or “strongly disagreed” with that idea. Of the few (19%) who wanted dues, all agreed AEA should collect them.

## Summary of Open-Ended Survey Questions

Besides the series of multiple choice and scalar questions, TIG leaders were asked several open-ended questions. The results were examined to identify most common themes in the results.

### **In general, what do you see as the primary function(s) or purpose(s) of AEA's TIGs?**

- Organize the annual conference/conference program (n=21)
- Provide/create a learning community (n=19)
- Create networking opportunities, professional and/or social (n=16)
- Move the field forward (n=13)
- Act as a point of contact/info on this part of the field (n=9)
- Provide an organizational home within AEA (n=7)
- Ensure diversity in voices/perspectives
- Communication between/among members (n=3)
- Support needs of group members (n=3)
- Mentor/Support New Members (n=3)
- Other (n=3)

### **During 2007, about how many hours did you spend in your role as a TIG leader, not counting time spent during the annual AEA conference?**

- TIG Chairs/Co-Chairs (n=21)
  - o Average: 41
  - o Range: 6-100
  - o Median: 30
  - o Mode: 20
- TIG Program Chairs/Co-Chairs (n=30)
  - o Average: 33
  - o Range: 4-150
  - o Median: 27
  - o Mode: 40
- TIG Chairs & Program Chairs (n=2)
  - o Average: 45
  - o Range: 10-80

### What kind of things did you spend your time on?

- Proposal coordination, review, program planning (n=56)
- Business meeting preparations (n=56)
- Communicating with members (n=32)
- Working on a TIG specific project (n=24)
- Collaborating with other TIGS (n=5)
- Other (n=1)

The final section of the survey tried to identify the aspirations of TIG leadership for their TIG—what did they see as an “ideal” for a TIG, what factors facilitated and hindered reaching the ideal, and what were some ways to support building that ideal.

### When you think of a TIG as being “active”, what sorts of things come to mind?

- Type/diversity of activities (n=31)
  - o More activities than just the conference (n=15)
  - o Offers social events/opportunities for networking (n=8)
  - o Offers a variety of activities (n=8)
- Communication-related (n=26)
  - o Communication between meetings (n=13)
  - o Communication mechanisms (n=11)
  - o Communication, general (n=2)
- Member-related (n=23)
  - o A strong, well-attended business meeting (n=8)
  - o Interaction among members (n=7)
  - o Engaged membership (n=5)
  - o Collective involvement (n=3)
- Session-related (n=15)
  - o Number of proposals/sessions (n=8)
  - o Quality of sessions (n=4)
  - o Attendance/participation at sessions (n=3)
- Leadership related (n=3)
- Provides resources for members (n=3)
- Mentoring (n=2)
- Other (n=15)

### Thinking about your definition of an “active TIG”, what factors seem to help some TIGs become and stay active?

- Membership related (n=44)
  - o Members—engagement (n=14)
  - o Members—core active group (n=8)
  - o Members—who is in membership (n=4)
  - o Members—pipeline/succession (n=3)
- Qualities of leadership (n=27)
- Topical focus of the TIG (n=11)
- Variety of sessions/events/opportunities (n=9)
- Communication (n=5)
- Openness/inclusiveness (n=5)
- Shared understanding/purpose (n=3)

- Web-related (n=3)
- Resources (n=2)
- Other (n=4)

**Thinking about your definition of an “active TIG”, what factors seem to impede some TIGs from becoming and staying active?**

- Problems with leadership (n=18)
- Lack of time or resources (n=11)
- Focus of the TIG (n=7)
- Apathy/lack of engagement or concern by members (n=7)
- Competition with other TIGs/other events (n=6)
- TIG size (n=6)
- Lack of communication (n=3)
- TIG Newness (n=2)
- Other (n=10)

**If you had your way, how/in what ways would your TIG be better in 5 years than it is currently?**

- Communication-Related (n=20)
  - o Better/more channels or mechanism for communication (n=14)
  - o Better job at communicating, in general (n=6)
- Session/Event-Related (n=18)
  - o More/more diversity in events and opportunities for members (n=10)
  - o More submissions/sessions (n=6)
  - o More training/workshops (n=2)
  - o Stronger business meeting/participation in business meeting (n=2)
- Member-Related (n=16)
  - o More engaged, active members/interaction with members (n=10)
  - o More members (n=6)
  - o Attention to creating pipeline of interested members/leaders (n=3)
  - o Building relationships/networking among members (n=2)
  - o More diversity in membership (n=2)
- Changes in type, activity, quality of leadership (n=4)
- Clear direction/plan/strategy (n=3)
- More collaboration with others/other TIGS (n=3)
- More visibility and influence in AEA/field/in general (n=3)

**What things could AEA do to support your TIG and improve its efforts?**

- Website support/space (n=25)
- Provide orientation/training, mentoring, resources for new TIG leadership (n=10)
- Better funding (n=6)
- Facilitate more cross-TIG collaboration (n=6)
- Stagger TIG business meetings (n=3)
- Highlight/promote TIGs and their activities (n=5)
- Improve process for maintaining and sharing TIG membership information (n=5)
- Other (n=9)

### What things could your TIG do to improve its efforts?

- Improve TIG-member communication (n=21)
- Develop/foster better leadership (n=15)
- Better planning (n=2)
- Hold socials (n=2)
- Increase member diversity (n=1)
- Other (n=6)

### Any other comments about TIG structure, governance, or benefits or how to improve the TIG experience for TIG leaders and members?

- TIG structure and benefits (n=15)
  - o Create a formal process for promoting TIG collaboration (n=6)
  - o Structure does not need modification (n=4)
  - o Business meeting schedule needs to be modified because inherently creates competition (n=3)
  - o TIG procedures need to be changed/standardized (n=2)
- TIG Breakfast (n=2)
  - o Orientation needs to be strengthened (n=1)
  - o Allow TIGs to share lessons learned (n=1)
- Other (n=2)
  - o Charging dues would facilitate more TIG buy-in/allegiance (n=1)
  - o A clear navigational path from TIG leadership to other roles in the organization should be established (n=1)

## RESULTS FROM THE ANALYSIS OF THE STRUCTURE OF OTHER ORGANIZATIONS

The five associations chosen for comparison have interest groups serving sub-specialties within the association's professional scope and also groups organized geographically (i.e. local/regional chapters or affiliates). However, the interest groups based on professional sub-class or content are more common, and our review covered only these.

Given AEA's projected membership growth, these five larger associations provide interesting information on several dimensions of how to structure and relate to interest groups:

### Types and Levels of Interest Groups

Most of these larger associations have more than one type of interest group; and the names for these groups vary. However, "division" and "section" generally denote more formal intermediate-level groups. These tend to be larger, and generally have higher requirements and thresholds for potential membership in order to form one. Other terms such as "(special) topical interest groups", "caucuses", and "forums" are used by these associations to denote less formal or time-limited groups. In some cases, these

informal groups serve as stepping stones to becoming a more formal group; in other cases, the formal and informal groups exist side-by-side long-term.

Of all the associations reviewed, APHA has the most complex interest group structure. “Sections”, the highest level, are formed along major public health discipline lines, must meet a variety of requirements, and serve important functions in fulfilling the mission of APHA. “Special Primary Interest Groups” (SPIGs) are self-selected groups of members whose primary interests are not fulfilled by one of the existing sections and thus do not choose a primary section affiliation. “Forums” work on specific issues important to public health that are cross-disciplinary, requiring expertise of members from more than one section or SPIG. “Caucuses”, rather unique to APHA, require at least 15 members who coalesce around either shared demographic attributes, special interests, worksite issues, or social justice concerns. While APHA currently has no operating caucuses, but the rationale for such a venue seems applicable to some of the TIGs and emerging issues in AEA.

APA is large and complex; the only one of our 5 associations with sections embedded within some of its larger divisions. While many of the divisions of APA are individually larger than the current size of AEA, even some of the larger sections within, say, the clinical psychology division are almost the size of AEA. A variation of this concept is found in AAA, where interest groups may be formed within one of its sections, so long as they have a minimum of 25 members.

The general concept of sub-groups within a specific interest group is not particularly applicable to AEA at its current growth trajectory. But the idea of multiple types of interest groups to accommodate the needs of a diverse group of members and the basic flexibility that they afford seems to hold promise.

## Forming an Interest Group

For our 5 associations, formation of a section or a division is guided by stringent requirements; the three most common being, a) a minimum number of petitioners, b) a waiting period to become a fully approved section or division, and c) the petitioners being current members or promising to become members within a certain period. For instance, ASA requires at least 100 current members who commit to remaining members for two years. AAA requires at least 250 individuals, who, if not members at the time, are expected to become members during the approval process. In both cases as well as in APA, proposed sections have up to two years to reach the minimum membership threshold.

In APA, a proposed division must also demonstrate that it will not be in competition with the existing divisions. By contrast, ASA, similar to AEA, allows multiple interest groups whose distinctions may not be apparent from the groups' names. Some examples of these indistinct interest group names can be found in Appendix C.

The procedures for forming more informal interest groups also vary across associations. As noted, in some associations (ASA and AAA), the informal interest groups are a step on the path toward recognition as a section. In others (AERA and APHA), the interest groups are fairly permanent structures and, like the formal group, get program time and association support.

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## Eligibility, Additional Fees, Benefits, & Limits

With the exception of AAA, membership in formal or informal groups is open only to the association's current members. AAA, at notes, allows non-members on the petition to start a new section, but the actual section membership is limited to AAA members. Three of the 5 associations (AERA and APHA are the exceptions) have no limits on the number of sections or divisions the members can join.

All 5 associations charge additional fees for membership in their formal interest groups, although APHA and AERA make the first one free. The amount of the fee varies between and within associations. The additional fees entitle the division or section members to additional benefits, most notably: additional premier journals in the specialty fields that the divisions or sections represent and additional web and other resources that are restricted to the division or section members only. The association's informal groups are generally free, and the benefits are not as well-defined, and vary between and within associations.

So too, the support provided by the associations to its formal and informal groups varies significantly among our 5 associations. While all allocate time at the annual conference, and (varying levels of) financial and logistical support, the overall picture is complex and will require further reviews if AEA decides to pursue the establishment of more formal interest groups.

## REFLECTIONS AND FUTURE CONSIDERATIONS

### Reflections on Survey Results

While the internal scan showed some dissatisfaction with TIGs, those findings are not corroborated by the findings of this TIG leadership survey.

In general, TIG leaders are satisfied with their TIG, but acknowledge, that in most cases the TIG focuses almost exclusively on the annual conference proposal process and TIG business meeting. However, the survey results indicate that most TIG leaders would like their TIGs to be "more" active.

When asked what an "active" TIG meant to them, most respondents pointed to a host of activities and opportunities beyond the annual meeting. And, related to this, when asked what they saw as the primary purpose and function of TIGs, among the most frequently cited purposes was community building, building a learning community etc. Yet, most (almost 80%) say their TIG does not do much beyond review of proposals. And, most leaders spend their time almost exclusively on duties related to the annual meeting—review of proposals and preparation for the TIG business meeting.

Given the sense they want TIGs to be "more" active, the low level of support expressed for proposed modifications to structure or governance was puzzling. Many felt TIGs could be too small, and a significant number wished their TIG were bigger. Interestingly, however, there was almost no support for setting size thresholds or consolidating TIGs. As noted, respondents indicate their TIGs do little beyond the business meeting and proposal review, but also noted that active TIGs do/should do offer a wide range of activities and communicate actively with their members, especially between annual meetings.

Yet, there was almost no support for ensuring some base level of services and benefits among TIGs. And more than one-half of respondents indicated they needed no funding beyond the \$300 stipend and other current resources to mount their activities. Further, almost none wanted the right to set TIG dues to raise additional funds.

Indeed among the proposed governance changes raised, only requiring periodic elections had broad support. This is consistent with survey findings that, despite the TIG guidelines on elections, there is diversity in how TIGs select their leaders, the length of time they serve, and how the baton is handed from one cadre of leaders to the next.

Finally, one motivation for this survey was some general unease about overlap and competition among TIGs. Survey results make clear that TIG leaders do see this overlap, but, by very large margins, see it as a good thing. Indeed, the most common cited change to TIG structure and benefits, according to our TIG respondents, is to help routinize and encourage collaboration among them.

What to make of these results? One interpretation is that while TIG leaders recognize that their TIGs are not all they would have them be, the major barriers seem related to personal and interpersonal factors—i.e. to quality of the membership (engagement, level of activity, interest) and the quality of the leadership (engagement, time and effort that can be devoted). These are not things resolved by changing the electoral process, the dues, or the governance structure.

What do TIG leaders support? Improved communication is one priority. It was the second most frequently cited attribute of “an active TIG”, the most often cited way they hoped their TIG would be better in 5 years, and the one thing they thought their TIG could do to improve its own lot. And, related to this, web support was the most often frequently cited way in which TIGs believed AEA can support them.

Leadership is a second lever for TIG improvement that runs through these findings. Quality of leadership is cited most often as the barrier when TIGs are not active and almost most often as the major lever in active TIGs. And when asked where AEA can help TIGs, providing leader development, skills, mentoring, was cited almost as often as communication.

Finally, we must remember that TIG leaders were asked to respond from the perspective of a single TIG and not from the perspective of AEA. What TIG leaders may need from a TIG and what AEA needs TIGs as an enterprise to do may be much different. As a large, and growing, organization, AEA needs TIGs not only to populate the conference sessions, but to serve as an organizational home, learning community, and focus for networking and social relationships. The internal scan findings reinforced that, and TIG leaders seem to acknowledge that as well. “Providing a learning community” and “networking” were listed most frequently after “organizing the annual conference” as primary purposes of TIGs. Hence, despite low ratings for some of the proposed structural and governance changes, AEA might still consider them if they hold promise as ways to make TIGs all that AEA needs them to be. And here the experience of our 5 associations may offer some insights on where to go and where to go first.

## Reflections on Analysis of Other Organizations

The review of a few larger associations’ interest group structure provides some valuable insights. As these associations have evolved, they have all gone through a stage of recognizing the need to formalize their

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interest group structure and then putting in place a layered structure with a few common parameters—in most cases, a multilayered structure with the formation of more formal groups such as sections while retaining topical interest groups as the more informal forum.

This may be the time, with AEA poised for rapid growth, to consider similar changes in AEA's interest group structure. If so, the analysis of our 5 comparison organizations offers some places to consider first

1. Establish a layered structure containing both formal interest groups such as a section and informal groups such as AEA's existing TIGs. The layered interest group structure of our comparison associations offers some standardized benefits and services through the more formal groups, while maintaining provisions for members to gather without formalizing their groups. In AEA, for example, this might mean that quantitative and qualitative TIGs would choose to become formal sections while many of the smaller TIGs might choose to remain as they are.
2. Define steps/process for becoming a formal group, including a minimum: number of petitioners, time commitment to join/remain a member of the interest group, and probationary period for full acceptance.
3. Establish fees/dues to support a defined package of benefits and services, which is reasonably standardized across all the association's formal groups.
4. Set rules and regulations governing the legal, functional, and financial relationships to the host association, services provided by the association and by the interest group, , conference organization and session allocation, etc.
5. Conduct periodic review of status on requirements and opportunity to require corrective or remedial action.
6. Make a provision for time-sensitive, time-limited, issue-oriented, trans-disciplinary groups to form and provide valuable service to the association and its members. For AEA, examples might include developing public policy statements on emerging issues, gathering of several TIGs for specific issues of concern or interest to all, and many others that have been addressed by ad-hoc committees in the past.

Major structural changes involving the interest groups will require buy-in from the board, the TIG leadership and the association members. Also, AEA will need to determine, in much greater detail, the type of structure that will fit AEA's particular situation and needs, particularly as the association's membership increase and becomes more diverse. . In the Membership Committee's view, any move toward a structural change should be undertaken with appropriate processes, expertise, and staffing in place.

## Future Considerations and Recommendations

Based on the findings in this report, the Membership Committee recommends three short-term and one long-term course of actions for the board to consider at this time. The three short-term actions involve the formation of new topical interest groups, streamlining of the governance and services provided by the TIGs, and improving communication/collaboration both within and among TIGs

The long-term course of actions involves the consideration of structural change needs of the interest groups. In making these recommendations, the committee recognizes that the TIG services related actions are likely to be addressed by the AMC in near future and, therefore, serve as reinforcing the actions that the AMC has in the pipelines.

**Recommendation 1 – Take Actions on New TIG Formation**

1.1 – Rescind the moratorium on new TIG formation that was put in place last year pending the Membership Committee review and recommendations.

1.2 – Consider additional rules for new TIG formation in near future, perhaps as early as from 2009. These may include a minimum number of signatures of AEA members in new TIG application, evidence that a certain number of signatories are also indicate they will be willing to serve as TIG leaders in the first five years of TIG formation, and a plan of action. The board may ask the Membership Committee for further research to establish these parameters.

**Recommendation 2 – Streamline TIG Governance and Operations**

2.1 – Institute mandatory leadership election once at least every three years with new sets of leaders. TIGs should be free to hold elections more frequently. Develop a form that documents the voting process and outcomes.

2.2 - Provide portals for offering standardized benefits if the TIG chooses to utilize rather than mandating specific benefits.

2.3 – Provide further TIG leadership development opportunities starting with mandatory training for new leaders. Consider developing options whereby new TIG leaders can join live online training with Q&A opportunities, and archive these trainings for those who are not able to join at the times the live ones are offered. The live ones should be offered between the annual meeting and the start of the new terms in January.

2.4 – Consider developing a TIG handbook that supplements TIG leadership training and provides a ready reference in management of TIGs.

2.5 – Require TIGs to submit annual budget detailing plans for using AEA funds and other outside incomes.

**Recommendation 3 – Establish formal mechanisms for increasing communication/collaboration within/among TIGs**

3.1 – Increase web support for TIGs

3.2 – Consider an online communication venue (e.g., newsletter) for TIG leaders which might include items such as TIG news, calendar of events, TIG member profiles, and other information for TIG leaders

**Recommendation 4 – Restructure the Way the Interest Groups are currently set up**

4.1 – Consider the need for establishing a layered interest group structure through board deliberation.

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4.2 – Establish markers such as membership size, number of TIGs, budget size that will trigger a process to develop a layered interest group structure.

4.3 – Once the markers for developing a layered interest group structure is reached, establish a planning and implementation team with adequate staffing and qualified consultants, which will be monitored by the AEA board and relevant committees.

## APPENDIX A: TIG LEADERSHIP SURVEY

Double-click on the image bellow to view the full survey which will open in a separate window.

**1. Survey Introduction**

The number of AEA TIGs has grown to 41, and anecdotal evidence suggests that TIGs vary widely in level of activity, governance, and benefits for members. AEA's Membership Committee is undertaking an assessment of TIGs in order to identify ways in which AEA can improve the TIG structure and support for individual TIGs.

As a TIG leader for 2007 will you please help us with this assessment by answering this short survey?

Your individual responses will remain private. Only members of AEA's Membership Committee responsible for analyzing the data will see them. All other data will be reported in aggregate. If you have any questions or concerns, please feel free to contact Tom Chapel (TChapel@dc.gov or 678.296.8436) or Bianca Montrose (BMontros@serve.org or 336.319.7437).

Thank you in advance for your time and survey responses.

Sincerely,  
The AEA Membership Committee

**\* 1. Please indicate whether or not you are willing to participate in this study.**

Yes, I agree to participate in this study.

No, I would prefer not to participate in this study.

Page 1

## APPENDIX B:

### DATA FROM ASSOCIATIONS INCLUDED IN ANALYSIS OF OTHER ORGANIZATION TIG STRUCTURE

<b>Association</b>	<b>American Sociological Association (ASA)</b>
Website	<a href="http://www.asanet.org">http://www.asanet.org</a>
2007 Membership	14,757
Annual Conference	6,000+
Interest Group Name	(Special Interest) Sections
2007 Count	44
2007 Section Membership Count	25,137
Membership Eligibility	Open to ASA members only
Limits	None, ASA members can join as many sections as they like
Membership Fees	Varies, but all sections have them. In 2007, \$5-\$41, most between \$10-12.
2007 Section Membership Range	201 – 1210.
How to Form a New Section	Must notify the Executive Office in advance. Must request the Committee and Councils per Manual guidelines to become a Section-In-Formation (Exec Office is available to answer questions). This proposal must be signed by at least 100 current members and the signature implies a two-year commitment to remain a member of the section. The committee reviews based on various criteria and forwards to the ASA Council with recommendations. Once approved as a Section-In-Formation, the SIF has two years to recruit at least 300 members and craft its own by-laws that must conform to ASA constitution and by-laws. However, once formed, it appears that sections are allowed to continue even at below 300 level.
Financial Allocation	Yes. The financial allocation is calculated based on membership count.
Conference Session Allocation	Sections with 300 members are allowed two sessions at the annual conference.

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Section Awards	Yes
Notes	<p>The website contains interesting notes on the history of sections within ASA dating back 80 years. However, since 1958, the sections have been governed by the same rules. Only one section closed down since then, and one other failed to establish required membership threshold to transition from SIF to a full-fledged section. Also, ASA does not appear overly concerned with the names and overlaps thereof of its sections. For example, ASA has the following sections:</p> <p>Culture; Race, Gender, and Class; Racial and Ethnic Minorities; Sex and Gender; Sexualities.</p>

<b>Association</b>	<b>American Anthropological Association (AAA)</b>
Website	<a href="http://www.aaanet.org">http://www.aaanet.org</a>
2007 Membership	Not known
Annual Conference	Not known
Interest Group Name	Two kinds – Sections and Interest Groups
2007 Count	Sections – 10; Interest Groups - 6
2007 Section Membership Count	Not known
Membership Eligibility	Open to AAA members only
Limits	Could not determine
Membership Fees	Varies for Sections, interest groups are free to join.
2007 Section Membership Range	Could not determine
How to Form a New Section	Must show evidence of at least 250 members, including non-AAA members. The approval takes place in two steps. A probationary period of one year is granted if the group fulfill all other requirement except membership. If at the end of the one year period the group has not reached 250 members, a one-year extension may be granted. If the group cannot demonstrate 250 members, it is discontinued as a section applicant. The group may choose to become an interest group depending on its memberships' desire. The overall application is first reviewed by the Operations Committee. Proposed section membership fees are reviewed by the Finance Committee and its recommendations are forwarded to the Executive Board. Any proposed publications are reviewed by both the Finance and Scientific Communications Committees.
How to Form an Interest Group	The requirements are less stringent for an interest group; however, its scope of operation is also limited. <i>“an Interest Group is more informal and more limited in its potential range of activities than an AAA Section. The intention is to provide AAA members a simple, informal vehicle for coming together to discuss, exchange information, advance some common interests or concerns not falling within the purview of an existing Section.”</i> An interest group may be formed by at least 25 AAA members, may not publish any print journal of its own, may not make public statements, and is approved for 3 years at a time at the end of which the interest group is reviewed for renewal. The interest group may charge nominal fees strictly to cover the cost of its services to its members

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	without building up a general fund.
Financial Allocation	Sections charge their own dues. Interest Groups cover its costs strictly through fees for its services.
Conference Session Allocation	Sections – Could not determine; Interest Groups – Business/Development session only.
Section Awards	Yes, for some.
Notes	The AAA website also lists a number of other anthropological societies under its list of sections and interest groups, however, these are not AAA sections or interest groups.

<b>Association</b>	<b>American Psychological Association</b>
Website	<a href="http://www.apa.org/">http://www.apa.org/</a>
2007 Membership	148,000
Annual Conference	Ranges from 10,000 - 15,000
Interest Group Name	Divisions (also have Sections within Divisions)
2007 Count	56 (Divisions 4 and 11 are vacant)
Membership Eligibility	Open to APA Members only
Limits	An APA Member, Associate, or Affiliate can join any number of divisions to which they qualify. Although some have more specialized requirements, most divisions simply require that you have an interest in the area
Membership Fees	Varies, ranging from \$11 to \$57
2007 Division Membership Range	In 2007, Division membership total 71,045. In terms of membership in individual divisions, the numbers range from 269 to 4,057
How to Form a New Division	A signed petition from a certain number of APA members who are willing to join the Division for the first two years is formed. The proposed division must not be in competition with other existing Divisions. The petition is sent to the Board of Directors and existing Divisions for review and comment. From the Board, the petition is then sent to the APA Council of Representatives.
Financial Allocation	No. The association provides certain services (e.g., setting up a listserv, accounting, elections) to a division; these services may be free or fee for service
Conference Allocation	Time allocation. Depending on membership and how many members list the Divisions as the primary division.
Division Awards	Yes (includes Fellow Status, Varying Types of Awards ranging from students awards to eminent scholar awards)
Note	Some divisions have various Sections within a Division. For example, Division 35, Society for the Psychology of Women has three Sections including Section 1, Section for the Psychology of Black Women, Section 3, Section on the Concerns of Hispanic Women, Section 4, Section for Lesbian and Bisexual Women. The APA hosts a Division Leadership Conference where division presidents-elect (a) learn the nuts and bolts of leading their division, (b) are encouraged to engage in long- range and

	strategic planning for their presidential year, and (c) are provided with opportunities to foster interdivisional collaborative ventures.
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<b>Association</b>	<b>American Educational Research Association</b>
Website	<a href="http://www.aera.net/">http://www.aera.net/</a>
Membership	25,000
Annual Conference	
Interest Group Name	Divisions
2007 Count	12 Divisions
2007 Section Membership Count	N/A
Membership Eligibility	AERA members can join as many divisions as they wish
Limits	N/A
Membership Fees	All AERA members receive one divisional membership with membership. Additional divisional memberships are \$10 each (\$5 for students)
2007 Section Membership Range	N/A
How to Form a New Section	N/A
Financial Allocation	N/A
Conference Section Allocation	See note below
Division Awards	Yes
Note	The association also has Special Interest Groups (SIGs) that provide a forum within AERA for the involvement of individuals drawn together by a common interest in a field of study, teaching, or research when the existing divisional structure may not directly facilitate such activity. The Association provides SIGs program time at the annual meeting, publicity, scheduling, staff support, viability, and the prestige of AERA affiliation.

<b>Association</b>	<b>American Public Health Association (APHA)</b>
Website	<a href="http://www.apha.org/">http://www.apha.org/</a>
2007 Membership	N/A
Annual Conference	13,000+
Interest Group Name	<p><b>Sections</b></p> <ul style="list-style-type: none"> <li>• Formed along major public health disciplines or programs</li> <li>• Serve as the primary professional units of the Association</li> <li>• Conduct activities that promote the mission and fulfill the goals of APHA.</li> <li>• Create a variety of opportunities for member involvement, thus making the APHA experience richer for individuals who have the opportunity to attend and choose to interact with their primary Sections</li> </ul> <p><b>Special Primary Interest Groups (SPIG)</b></p> <ul style="list-style-type: none"> <li>• An open group of self-selected APHA members sharing a common occupational discipline or program area interest and <u>electing no primary Section affiliation</u></li> </ul> <p><b>Forums</b></p> <ul style="list-style-type: none"> <li>• A membership unit composed of APHA members who are working together on a specific issue that is important to public health, crosses disciplinary and section or SPIG boundaries, requires expertise that may reside in more than one section or SPIG, and supports APHA's mission</li> </ul> <p><b>Caucuses</b></p> <ul style="list-style-type: none"> <li>• A group of at least 15 APHA members or partisans of a particular position on an issue important to APHA, who pursue a desired result within the Association</li> <li>• Is considered to be “in official relations” with APHA, rather than a regular component of the Association</li> <li>• two types of Caucuses that allow members to coalesce around <ul style="list-style-type: none"> <li>○ (1) shared characteristics that cannot be changed (i.e., ethnicity/race, gender, sexual orientation) and</li> <li>○ (2) special interests, worksite issues, and social justice issues</li> </ul> </li> </ul>
2007 Count	<p>25 Sections</p> <p>7 SPIGs</p> <p>3 Forums</p> <p>N/A Caucuses</p>

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2007 Section Membership Count	N/A
Membership Eligibility	APHA Member
Limits	Maximum of 3 Sections or SPIGs
Membership Fees	First one free, the additional ones \$30 each
2007 Section Membership Range	N/A
How to Form a New Section	N/A
Financial Allocation	N/A
Conference Session Allocation	N/A
Section Awards	N/A
Notes	