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# Maximizing Engagement in the American Psychological Association and Its Affiliated Professional Associations

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## *2012 Annual Report of the Policy and Planning Board*

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The 2012 Policy and Planning Board of the American Psychological Association (APA) was chaired by Christopher W. Loftis, PhD. Other members of the board included Gwyneth M. Boodoo, PhD; Linda F. Campbell, PhD; Carol A. Dwyer, PhD; Michael J. Murphy, PhD; Maureen A. O'Connor, PhD; William J. Strickland, PhD; Michael Wertheimer, PhD; and Erica H. Wise, PhD.<sup>1</sup> Donald N. Bersoff, PhD, JD, was the liaison for the Board of Directors. APA Bylaws Article XI.7 (<http://www.apa.org/about/governance/bylaws/article-11.aspx>) requires that the Policy and Planning Board report annually by publication to the membership and review the structure and function of the Association as a whole every fifth year.

### Introduction

For professionals interested in psychology, the decision to join a membership association is a complex, multifaceted “value proposition” that evolves over the life span. Individuals join associations to support and affiliate with their discipline and to acquire personal benefits (career guidance, informal and formal networking, job boards, etc.). The relative importance and influence of these two motivations (i.e., supporting or affiliating with the *discipline* versus obtaining direct *personal* benefits) are presumed to vary as the individual progresses in his or her profession and career.

Membership associations are increasingly challenged to understand and address the interests of generational cohorts across a range of career fields. In its most recent five-year report (2010; APA, 2011), the Policy and Planning Board (P&P) emphasized that successful associations continuously assess and improve customer service and organizational adaptability, which are two measures that differentiate “remarkable” associations from those that are merely “good,” according to a study conducted by the American Society of Association Executives’ Center for Association Leadership (2006) and published in *7 Measures of Success: What Remarkable Associations Do That Others Don’t* (hereafter referred to as *7 Measures of Success*). Within this framework, “remarkable” associations not only excel in communicating how they address members’ interests, but they also seek to understand and respond to how members experience and value interactions with the association. Generational factors are also impor-

tant to explore when seeking to understand members’ interests and what they need from an association.

P&P’s annual report this year expands on our examination of APA through the lens of the *7 Measures of Success* by focusing on member “engagement” as a critical topic to explore in greater depth for several reasons. First, recruitment and retention of APA members is a frequent topic of discussion and debate for leadership in APA, its divisions, and its affiliated regional, state, provincial, and territorial associations. Second, the first objective under Goal 1 (Maximize Organizational Effectiveness) of APA’s strategic plan is to “enhance APA programs, services and communications to increase member engagement and value” (APA, 2009). Finally, understanding how members connect and engage with an association in different ways across membership categories and generations is a challenge discussed in the summary of findings from the research conducted for the APA strategic plan (APA, 2008).

As part of its mission to examine APA policy and planning activities from a broad, cross-constituency perspective, P&P discussions frequently turn to issues of membership satisfaction, participation, and understanding and appreciation of association priorities and activities. These discussions have led to the recognition that APA, its divisions, and its affiliated associations are engaged in a wide range of initiatives, programs, membership campaigns, and other efforts to deliver value to potential members. As P&P considered the merits and challenges of different membership initiatives and activities, it recognized that *engagement* is a fundamental component of an association’s ability to provide value to a diverse and evolving membership pool. P&P also noted the critical need for a comprehensive assessment of association activities and functions that influence member engagement in order to inform leadership decision making and the prioritization of resources and programs that influence member engagement.

This report offers a framework for how to strategically and systematically provide a range of high-value engagement opportunities across membership cohorts and activi-

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<sup>1</sup> The members of the Policy and Planning Board acknowledge with gratitude the guidance, major substantive contributions, and ongoing coordination provided by staff liaison Sarah Jordan.

ties. The first section provides a selected overview of literature related to engagement and offers some general considerations for incorporating research into evaluating and refining member engagement activities. Next, we review survey findings on why individuals join membership organizations. Finally, we present 10 engagement domains as a framework for designing, evaluating, and monitoring the impact of engagement initiatives and activities.

## Defining Engagement

Engagement is a broad construct comprising cognitive, emotional, and social domains that influence perceptions of membership value. *Merriam-Webster's Dictionary* defines engagement as “emotional involvement or commitment” and as “the state of being in gear.” Within the context of associations, engagement has been defined as the “result of a person investing time and/or money with the organization in exchange for value” (Gammel, 2011, p. 3). The more one invests—in time, money, or commitment—in an organization, the more engaged one can be considered to be in that association.

Psychologists have long been interested in the concept of engagement. Most of this literature has focused on engagement in the work environment and, more recently, on academic engagement. It is beyond the scope of this report to provide a comprehensive review of this extensive literature, but a number of key findings serve as background for an expanded consideration of member engagement in APA. In taking a broad look at the notion of engagement in APA, its divisions, and its affiliated associations, this report considers a variety of perspectives, identifies key definitional and methodological issues, and incorporates the lessons that can be learned from the research literature into a conceptualization of engagement.

## Industrial and Organizational (IO) Psychology Literature

The vast majority of research on the concept of engagement has focused on work engagement and derives from the broad organizational literature. In this literature, the construct of engagement is typically tied to the engagement of employees within an organization. Although it would be an oversimplification to substitute “association” for “employer” and “member” for “employee” when exploring the applicability of the IO literature to the context of professional associations, a review of the literature does provide many meaningful parallels with membership engagement. Association leadership will need to distinguish the directly relevant variables (e.g., satisfaction, effort, retention, pride, commitment) from the less relevant variables (e.g., customer satisfaction, profitability, returns, productivity) when looking for approaches to measure, and perhaps increase, member engagement.

Vance (2006) reviewed the numerous definitions of employee engagement, primarily derived from employer-based attitude and opinion surveys. Common themes in those definitions that might be hypothesized to relate to association engagement include employees’

- satisfaction with their work,
- pride in their employer,
- enjoyment of and belief in what they do,
- perception that the employer values their contributions,
- opportunities to perform well,
- effort above and beyond the minimum, and
- understanding of the link between their job and the organization’s mission.

Saks (2006) drew a distinction between *job engagement* and *organizational engagement* that may be important in extrapolating from employee engagement in organizations to member engagement in professional associations. Job engagement is linked to positive economic outcomes for employers and may not have a direct parallel within the association context; organizational engagement, on the other hand, is potentially applicable in both contexts.

Kahn (1990) suggested that employees are influenced by three questions when determining how much to engage with an organization:

- *How meaningful is it for me to bring myself into this situation?* Meaningfulness might be evaluated by (a) tasks that are challenging, varied, and autonomous; (b) roles that include power and influence; and (c) interactions that are rewarding.
- *How safe is it to do so?* Safety might be evaluated by (a) the ability to engage without fear of negative consequences to one’s self-image, status, or career; (b) supportive, resilient, and clarifying leadership; and (c) roles that stay within the bounds of organizational norms.
- *How available am I to do so?* Availability might be evaluated by available physical or emotional energy.

Although these questions were targeted at employees in an organization, they would also likely prove useful to association leadership in evaluating perceptions of member engagement. The first question addresses how meaningful membership is to the individual and how effective the member feels in being able to accomplish personal or professional goals within the context of the association. The second question relates both to professional identity and to the concept of *trust* that investment in the organization will bring value. This is akin to Putnam’s (1995, p. 666) concept of “civic” engagement, in which he claimed that “people who join are people who trust.” The third question relates to what might be considered the more prototypical membership organization concerns involving the member’s calculus of whether an outlay of time or money or both will fit with his or her current professional and personal parameters.

The consequences of employee engagement are hypothesized to include such positively valued organizational outcomes as improved profitability, sales, shareholder returns, employee retention, employee productivity, and customer satisfaction. The antecedents of engagement presumably include working conditions such as career opportunities, the nature of the work itself (e.g., auton-

omy, challenge, and variety), and the nature of leadership. Employee dispositions are widely assumed to be important as antecedents to engagement (Sackett & Niland, 2010). However, as a caveat, Macey and Schneider (2008, p. 4) noted, “The relationship among potential antecedents and consequences of engagement as well as the components of engagement have not been rigorously conceptualized, much less studied.”

An exploration of how these possible outcomes of employee engagement relate to member engagement offers potential models for associations to identify and quantify levels of member engagement. For example, retention certainly is relevant, as is productivity—when considered broadly to include investing time in the organization. The implications of the above review also suggest that association members may frequently reassess how association activities fit with their personal values, beliefs, and goals. Whether an association builds and retains members’ “trust,” “pride” in the association, and “meaningfulness” of association membership is a critical factor in an individual’s willingness to join and remain in an association. These findings underscore the influence of open, transparent communication on member recruitment and retention.

### **Affective, Cognitive, and Neurobiological Bases of Engagement**

In this section we consider the affective, cognitive and neurobiological aspects of membership engagement in professional associations. Member satisfaction at the most basic level tends to focus on factors such as membership dues and concrete benefits (e.g., access to scholarly journals, etc.). Is there more to understanding what keeps one engaged in a professional association than an enumeration of the tangible and practical benefits?

An increasingly evidence-based framework for positive emotionality offers some insights into what may serve to motivate members to join and remain in professional associations. For example, the *broaden-and-build theory* of positive emotions (Fredrickson, 1998, 2001) hypothesizes that positive emotions can broaden one’s cognitive, attentional, and behavioral repertoires. When repeated positive experiences occur, a broadened state and perspective can facilitate the cultivation of personal resources, resilience, and well-being (Cohn & Fredrickson, 2009; Cohn, Fredrickson, Brown, Mikels, & Conway, 2009; Fredrickson, 1998). Research increasingly supports the notion that positivity, in addition to its impact on attention, cognition, and creativity, can also enhance feelings of closeness with and trust in others (e.g., Dunn & Schweitzer, 2005; Waugh & Fredrickson, 2006). Increased positivity can buffer stress and negative emotional reactivity while also increasing adaptive thinking, feeling, and action (Garland & Howard, 2009). In a professional association, for example, the sharing of positive interactions with colleagues, whether through direct or vicarious interactions, may serve to buffer the challenges of professional work in many settings.

From another perspective, Bandura’s (1997) social cognitive theory could be used to examine engagement’s cognitive component. Self-efficacy, or the “belief in one’s

capabilities to organize and execute the courses of action required to produce given attainments” (Bandura, 1997, p. 3) can also be understood as leading to collective efficacy (Salanova, Llorens, & Schaufeli, 2011). People who work together and who share beliefs and affective experiences can develop a sense of collective power to achieve desired outcomes. Research suggests that the stronger the group’s belief in its collective efficacy, the better the group’s performance will be (Stajkovic, Lee, & Nyberg, 2009). Building a sense of community and working toward shared goals could contribute to collective efficacy and thereby enhance engagement.

When members successfully join and experience positive engagement, it becomes possible for associations to cultivate a sense of positive belonging that enhances opportunities for professional development, for mentoring, for sharing of new ideas, research, and opinions, and for establishing meaningful networks with colleagues. Association policies and activities can also offer a constructive, positive means of influencing the world that can be reinforcing and inspire expanded professional engagement.

Even a cursory review of basic concepts and research findings suggests that achieving success in member engagement requires consideration of members’ underlying emotional, motivational, and cognitive needs when thinking about association culture as contributing to member engagement. These emotional and cognitive engagement factors may be critical to consider when promoting association membership and refining APA recruitment and retention strategies.

### **Marketing Considerations**

In this section we summarize the findings from two key surveys that identified factors that influence association membership. The first survey was conducted by the American Society of Association Executives’ Center for Association Leadership and was published in *The Decision to Join: How Individuals Determine Value and Why They Choose to Belong* (hereafter referred to as *The Decision to Join*; Dalton & Dignam, 2007). This study pooled data from 16,000 respondents representing 18 different organizations to create a diverse sample of people, including current members, past members, and those who could be members but never chose to join (termed *never members*).

The second survey was conducted by McKinley Marketing Partners specifically for APA (hereafter referred to as the McKinley report; APA, 2008). This survey collected an extensive array of data from APA members through electronic surveys, focus groups, and interviews from over 6,300 respondents to assess the strengths, weaknesses, opportunities, and threats facing APA and to guide the creation of the APA strategic plan.

Following is a summary of key findings from *The Decision to Join* (Dalton & Dignam, 2007), supported, where applicable, by specific data on APA from the McKinley report (APA, 2008):

1. *Networking, technical information, and professional development are among the most important association functions for current, former, and “never” members*



*alike*. Government and public affairs (including legislation and regulation) and societal recognition of the discipline are less important to never members, which may indicate that the decision to join follows from a better understanding and appreciation of the role of associations in impacting societal issues and government policy. Interestingly, access to timely information about the field is less valued among former members than among current and never members, who rate this need similarly.

Survey data from the McKinley report indicate that among the most important reasons for members to join APA are (a) identification with the field and (b) keeping informed about professional information. Further, members remain members because of (a) access to resources and (b) networking. APA members report that they most value credible scientific information, the raising of awareness on important matters in the field, APA being the primary source for professional news, career resources, highly valued journals, and high-quality educational information, and a positive sense of community. APA members cited the following as the best options for APA's future investment:

- developing web-based tools
- providing openly shared resources to all branches of APA, not to specific areas
- strengthening existing products rather than trying to come up with new products
- publishing more translational and applied publications rather than prestigious peer-reviewed journals
- concentrating efforts on U.S.-based psychologists rather than international psychology

2. *A single disappointing association experience can cast a negative shadow over future invitations to join any association.* Data from *The Decision to Join* reveal that former association members rate associations as less "capable of addressing the practical needs of individual members" than current or never members. Ratings by current and never members are similar on this item, suggesting that there is a small tipping point for moving never members to join associations.

3. *When former members (currently not members of any association) are compared to current members who have dropped memberships in the past, former members are more likely not to belong to any association because of less financial support from employers, a change in career focus or job, or inadequacy of local programs offered.* For current members who discontinued membership in the past, employer subsidy of membership dues is a less important factor than dissatisfaction with association performance, change in professional interest, and a perception that the association was ineffective in representing their field. Thus, cost was a greater concern for former members who never rejoined, while change in career focus and perception of the association's ability to represent their career field are the two highest rated reasons for discontinuing members among both groups.

The construct of "primary membership" may offer some guidance on ascertaining an association's value and its vulnerability to being dropped by members. Data from the McKinley report reveal that 58% of APA members identified APA as their primary psychological membership organization or society. Fifteen percent selected a state or regional psychological association, whereas 28 percent identified other organizations or societies as their primary psychology membership. The top three reasons for identifying an organization as their primary membership were (a) "provides content and resources that are more relevant to work" (80%); (b) "more meaningful interaction with other members" (59%); and (c) "more effective in helping you stay abreast of developments in the field" (53%).

4. *Leaders who are involved at the governing level give different importance ratings to both personal and good-of-the-order benefits than do the majority of members who are not involved in governance.* Survey data from *The Decision to Join* indicate that perception of value rises with involvement to a point where those who govern the association are less in agreement with the perceptions of the majority who are not involved. Advocacy, networking, and the impact of the association on society tend to become more important as leadership involvement increases. Interestingly, creating and disseminating standards of practice are rated as more important by uninvolved members and former members than by current members engaged in governance activities.

When asked about increasing their involvement in APA, a few respondents expressed an interest in serving on an APA board, committee, or task force (16%); some said they would like to serve as a mentor to a psychology student or early career psychologist; a small number said they would like to inform their local community about psychology (5%); and even fewer said they would like to be involved in grassroots legislative advocacy programs (3%). A majority responded (58%) that they were not interested in getting more involved; however, 74% agreed or strongly agreed that "APA should find ways to enable and encourage more members to participate directly" in its activities. APA members say they are most connected to APA through the divisions, a directorate or office, and the publishing program.

5. *Governance-involved members are more likely than uninvolved members to promote association membership.* When asked the "promoter" question—"Would you recommend the association to a colleague?"—respondents in *The Decision to Join* study without any involvement in association leadership were less likely to recommend association membership than were those involved in any level of volunteer activity within an association.

6. *Appreciation of associations increases with age.* Respondents to *The Decision to Join* survey were stratified into 4 cohorts: Millennial (under 30), Gen X (30–42), Boomers (43–59), and Pre-War (60 or over). The perception of the value of an association increased with age for each of the following questions:

- What is your overall attitude toward associations?

- Do you believe associations are capable of addressing the practical needs of individual members?
- Would you say that there are too many associations in your professional area of interest, too few, or is the number just right?

Conversely, ratings for the following question declined with age: “Do you think there will be a greater or lesser need for associations five years from now?” Millennials, followed by Gen X members, reported a greater need for associations than older cohorts. A surge in entry-level age groups’ interest in associations appears to occur at about the time they have clarified their career paths and are coming to understand what that requires. There is a clear connection between professional development and commitment to a career path that positively correlates with joining membership associations. Although not addressed in this study, it would be interesting to explore the impact on this early career pipeline of increasing competition from multiple societies within a discipline and competing sources of information on the web.

Data from the McKinley report indicate that members expect APA to play an increased role in (a) educating the public, the health care community, and lawmakers about a range of issues, including the positive impact psychology can have on health, wellness, resolving global conflict, and so forth; (b) changing public perception of what psychology is (and what it is not); and (c) differentiating psychologists’ unique roles and abilities. Student members place greater value on access to journals, books, and publications; the ability of APA to advance their careers; and the opportunity to meet and network with other members.

### ***Brief Historical Review of Targeting Engagement to Specific Membership Cohorts***

Special considerations may apply to membership engagement that vary by cultural factors and age cohort. A focused review of these factors within APA follows. As a starting point in terms of its policies and organizational structure, APA governance has been reasonably effective in fostering the representation, engagement, and voice for members from underrepresented groups (e.g., people of color, women, and disabled persons). There are currently clear governance structures that allow the organization to address the specific interests of the members of these groups. Furthermore, policies have been adopted to ensure that diverse groups are well represented throughout governance and serve on APA boards and committees, and in the governance of divisions.

As one example of how this shift has occurred within APA, the Division of Women in Psychology (Division 35, now the Society for the Psychology of Women) was approved by Council in 1973. This division has advanced the interests of women in APA governance and in the profession. The division arose in part from the emergence of feminist perspectives that advanced women’s rights and gave voice to the frustration arising from sexism and male privilege. Within APA, sexism was commonly reported well into the 1970s and presented in areas such as the

treatment of female graduate students by male faculty members and in the advantages men had over women in employment recruitment at the APA Convention. Social expectations, ethics complaints, faculty conduct standards, and legal decisions have changed expectations regarding the treatment of women in academic and work settings (Russo & Dumont, 1997). Similar changes have arisen in the treatment of racial and ethnic minorities, which were advanced at the time when civil rights, integration, and affirmative action were emerging as legal and social expectations within the business world and the general society. They resulted in greater attention and effort to ensure inclusion of ethnic and racial minorities in professional and business settings and advancement of opportunities for those groups in psychology (Fouad & Arredondo, 2007).

Over time, inclusion has extended to broader perspectives of diversity, and APA has fostered engagement and provided support for members from various groups including gay, lesbian, bisexual, and transgender psychologists and psychologists who are physically disabled. In addition to addressing engagement in the association by members and groups from diverse backgrounds, APA has developed policies and structures to advance participation by students and early career psychologists. Ensuring opportunities for engagement by members of these groups fosters continued membership and provides for the development and training of future leaders of the organization. Perhaps more important, their participation enables governance to understand the interests, preferences, and perspectives of younger cohorts and make adaptations such as those that enhance the programming, communication, and incorporation of new technologies. Surveys of members of the American Psychological Association of Graduate Students (APAGS) and of early career psychologists have found that they have very clear and pressing needs and interests. Students are concerned about completing their degrees and dealing with dissertations and other demands. Early career psychologists are generally interested in issues such as finding an internship, getting licensed, obtaining employment, and paying off debt accrued during training. Furthermore, engagement provides them with opportunities to make contacts that will assist them in joining or building a practice, finding employment, developing a research program, and achieving tenure. Engagement with these groups will require that they be given a voice—and these groups will also benefit from guidance, assistance, advice, and support.

APA and its affiliated professional associations have been challenged to provide a voice for and address the interests, changing needs, and expectations of a very diverse membership. Until relatively recently in its history, APA had not focused on the changing expectations of an increasingly diverse membership. As APA moves forward, these considerations will need to be front and center in order to ensure organizational vibrancy and enhanced membership engagement.

## Proposed Engagement Framework

Building upon the theoretical considerations and survey findings discussed above, P&P reviewed and discussed how members engage with psychological associations and how these associations engage their membership. P&P recognized that engagement occurs along a continuum, from mere affiliation and relatively passive receipt of information to active participation in governance and advocacy on behalf of the profession. Activities involving minimal effort might include viewing the website, perusing newsletters, and reading public service announcements. Activities requiring moderate engagement that can be conceptualized as addressing both individual and association needs might include purchasing association products and services at a discount, attending webinars and conferences, and reviewing or participating in listserv discussions. Higher level activities require more commitment of time and resources, such as governance, grassroots advocacy, and community service on behalf of the association.

The research presented above suggests that lower levels of engagement are driven mostly by personal needs to access information and data, whereas higher levels of engagement are more driven by relationships, professional development needs, and the desire to impact the discipline or society on a larger scale. However, association leaders should take care to avoid assumptions that high engagement is linked only to high levels of governance involvement. P&P believes the challenge, quite simply, is to provide a variety of meaningful, relevant, and personally rewarding engagement opportunities over the career path of each member and simultaneously across cohorts of members. Especially important is the recognition that individuals may be satisfied with varying levels of engagement at different points in their life paths. It is clear from the data that the concept of engagement varies widely among individual members.

From the exploration of the literature and survey data, P&P identified 10 domains that underlie effective engagement in professional associations in general and in APA in particular: membership, recognition of members, member communities, communication and publications, professional products and services, conferences and conventions, community engagement, continuing education, leadership and governance, and political activism. These domains, listed in Table 1, offer a roadmap for associations to

- implement a structured approach to comprehensively consider a range of valued engagement opportunities;
- systematically assess the impact of prioritized engagement activities across member cohorts;
- identify and track initiatives and activities for improvement, expansion, or closure;
- ensure that flexible pathways are available to move membership cohorts from lower to higher levels of engagement.

P&P recognized that associations provide many of the activities denoted by these domains to some degree. Our question, and the principal impetus for this report, is, are adequate data being collected to assess the perception of these activities and of their value across member cohorts? Effective assessment of such engagement data would allow us to determine whether members are engaging at a level that gives them optimal satisfaction with the association. Further, if data are being collected, how are the data monitored and used by the association leadership to allocate resources and to develop policies or initiatives that are sensitive to member satisfaction and value?

To address these questions, P&P developed measures of engagement at the individual and organization levels (columns 3 and 4 of Table 1) for associations to offer in order to track adequate opportunities for engagement across membership cohorts. Our literature review suggests that engagement should be assessed at both the member and association levels in order to evaluate the perception of value for the individual as well as the impact of member engagement on the association. The activities, measures, and outcomes provided in Table 1 offer a variety of options for associations to build a structured, comprehensive approach to ensure a range of engagement opportunities, to monitor and identify areas for improvement, and to systematically assess the impact of prioritized engagement activities at the individual and association levels. P&P also noted the critical need for a comprehensive assessment of membership activities to inform association planning and prioritization. In the next two sections, we provide suggestions on how to select measures and to develop a dashboard to track the satisfaction, value, and outcome of engagement activities.

## Measuring Engagement

Collecting meaningful, valid data is fundamental to evaluating the value and perception of engagement activities. The framework proposed in this report suggests flexibility in determining how to measure member engagement for different types and sizes of associations. P&P strongly recommends that measurement of engagement begin with a comprehensive design phase. This phase should address data gathering, analysis, and the desired inferences to be supported. This part of the measurement process will be key for being able to draw valid inferences from the data. Comprehensive design is necessary to maximize both the cost-effectiveness of measurement and the scientific quality of data and inferences drawn from them. A brief outline of a practical approach that emphasizes data quality, utility, and efficiency follows:

1. Develop a consensus statement of engagement constructs as they pertain to the particular association or other setting, including the specific inferences that are to be drawn from the study of engagement. Be sure to consider that the inferences may well not be “one size fits all.” As noted above, the people whose engagement is being studied probably fall into different cohorts with differing characteristics and engagement needs.

**Table 1**  
*Engagement Domains and Activities*

Domain	Activity	Individual metrics	Association metrics	Outcomes
1. Membership	Requesting information about membership Requesting and submitting membership application Paying dues	Satisfaction with membership application Satisfaction with membership Satisfaction with dues policies	Total number of members, renewals, and resignations Change in membership over 5- to 10-year period Members' rating of how likely to recommend association membership to nonmembers	Identification with and commitment to association Enhanced credibility of the association Financial health of the association
2. Recognition of Members	Fellowships Awards Honors	Number of fellowships, honors, and awards received Membership appreciation for association recognition of member achievements and status	Number of fellowships, honors, and awards bestowed Public recognition of the quality/contributions/status of association's membership Promotion of high standards	Enhanced status of membership Increased self-evaluation Enhanced value of membership
3. Member Communities	Flexible, accessible, specialized networks for mentoring and professional development Listserves, websites, social media, blogs, webinars, "virtual happy hours," etc.	Satisfaction with communications and publications Satisfaction with the range and depth of content Number of items published Number of editorships and time spent editing	Membership satisfaction with communications Number of subscriptions Number of items published in the media Number of awards received for publications Reviews of publications Satisfaction, including accessibility and user friendliness, with print and web-based publications/content	Enhanced contact with colleagues and the association Valued exchange of information and ideas and sharing of expertise Identification with professional subgroups Enhanced affiliation and cohesion of the association
4. Communication and Publications	Issuing publications, newsletters, journals, books Publishing refereed journals Editing association and media publications Popular media, TV, newspapers, news magazines	Number of hits per member on the website, blog, etc. Member perception of quality and value of contact with association membership (e.g., valued exchange of information and ideas; ability to share expertise) Affiliation with membership subgroups within association versus competing associations Satisfaction with mentors and professional development Publishing in association outlets	Number of hits across membership and within cohorts on the website, blog, etc. Percentage of members registered for listserves, social media, etc. Membership's perception of ability to network and access preferred communication channels Membership satisfaction with professional networking opportunities relative to other associations	Up-to-date, high-quality professional information and products Dissemination of scientific and professional information Public recognition of the profession

*(table continues)*



**Table 1 (continued)**

Domain	Activity	Individual metrics	Association metrics	Outcomes
5. Products and Services	Generating e-products Negotiating discounts for insurance, etc. Developing other products and services	Number and types of products and services purchased Satisfaction with products and services Member awareness and perceived value of benefits	Number of products and services sold Other marketing data on products and services	Access to specialized services and information Provision of valued products (e.g., financial benefits in insurance, car rentals, etc.)
6. Professional Conferences and Conventions	Conventions Conferences Seminars Workshops	Number of conferences and conventions attended Number of events participated in Satisfaction with conventions, seminars, or workshops Number of new professional contacts Satisfaction with knowledge gained	Number of conferences, conventions, workshops, and seminars offered Number of participants in conferences, workshops, and seminars Member satisfaction with conferences, workshops, seminars, and convention	Access to new knowledge Enhanced competence of future leaders Face-to-face exchange of information Member networking Enhanced identification with association
7. Community Engagement	Disaster response network Public education campaign Business of practice network Other communication action networks	Participation in community activities Satisfaction with community engagement activities Perception of ability to respond to and address community need Satisfaction with quality and value of the association's community materials Time involved in community outreach, training, and media interviews	Membership perception of the association's commitment to the community Public perception of the association's contribution to the community Number of community outreach and media interviews by members Marketing data on public perception of profession and discipline of psychology	Ability to respond to community need Utilization of psychological skills/knowledge to help the community Demonstration of association's value to larger community Expanded awareness of psychology
8. Continuing Education	Encouraging and monitoring offerings for continuing education (CE)	Number of CE sessions attended Satisfaction with CE offerings, quality, and experience	Number of CE offerings Number and percentage of members enrolled in CE Membership satisfaction with CE offerings, quality, and experience	Enriched skill and knowledge among members Maintenance and enhancement of member competence Provision of value and addressing of membership's current needs

*(table continues)*



**Table 1 (continued)**

Domain	Activity	Individual metrics	Association metrics	Outcomes
9. Leadership and Governance	Nomination and election or appointment to divisional, state, committee, board, or task force positions Develop policy guidelines, standards, or resolutions Work in coalitions or partnerships with other associations	Number of leadership positions sought and attained Time spent on governance and leadership activities Satisfaction with governance and leadership activities, including willingness to serve again Perception of ability to contribute to policy development and the direction of the discipline	Number and percentage of members involved in leadership and governance Membership perception of quality and usefulness of policy development Membership perception of ability to participate and engage in policy and program development Membership perception of association's ability to partner with other associations and stakeholders	Recognition by peers Ability to influence profession and association policies Professional development and increased self-education Upholding of high-quality governance decisions Assurance of member input in association operations
10. Political Activism	Phone calls, e-mails, letters, petitions, or visits to legislators and policymakers Hosting political events Contributing to a legal brief Fundraising	Number of times engaged in each activity Time spent in each activity Perceived efficacy as a change agent Satisfaction with political activities Perceived personal impact on public and policymakers	Passage of legislation Election of preferred candidates Feedback from key policymakers Member satisfaction with lobbying efforts Perceived impact of association on policymakers and public	Influence on decision makers Securing of legislation or regulation favorable to the association and the discipline of psychology Election of candidates and support of government staff who advance the discipline

2. Identify individual and association metrics for engagement, and link metrics to the engagement outcomes. Columns 3 and 4 of Table 1 give some examples of facets of engagement for individuals and associations. Measurement of engagement will almost certainly need to be multifaceted in order to reflect the multidimensional nature of the engagement construct, including cognitive and affective content.

3. Specify proposed sources of data and develop a matrix of measurable facets of engagement classified by these sources of data. Data may come from existing data sources within the association, existing instruments, or instruments to be created specifically for this effort. Multiple methods of data analysis will be useful: Both qualitative and quantitative data are very likely to be relevant and useful and needed to ensure the fullest

coverage of the target engagement construct defined in Step 1 above.

4. Analyze the correspondence between the consensus definition of engagement (Step 1 above) and the measurable facets of engagement (Step 2 above) to identify gaps in coverage of important aspects of engagement. Make plans to address these gaps where feasible, and determine the limitations that any remaining gaps will impose on the study's ability to contribute to improved engagement.

5. Plan for data analysis and dissemination, considering how frequently the engagement dashboard will be need to be updated for various association meetings.

6. Create a set of timelines for Steps 1 through 5 above, and identify required personnel and financial resources, along with potential sources of funding and

staffing through paid or volunteer work, to support the data collection and reporting activities.

## Engagement Dashboard

Given the increasing competition among associations, P&P recommends creating an engagement dashboard for association leaders to track engagement opportunities and evaluate their use, satisfaction, and value across member cohorts. The dashboard should provide sufficient detail to monitor, prioritize, and improve engagement activities as needed. An initial dashboard will likely reveal areas where engagement activities are limited to specific types of members as well as areas where data are inadequate to assess engagement across member cohorts. Even an incomplete dashboard will be useful as a starting point for leaders to understand the range of engagement opportunities truly available to all membership segments and types and to assess whether activities are receiving the appropriate level of planning, resources, and management. A dashboard will also illustrate areas where existing data collection instruments provide an inadequate picture of value and satisfaction across member cohorts.

P&P believes that success in all 10 domains will foster a robust, well-rounded sense of satisfaction and value across the membership, which will in turn enhance member willingness to fully engage with and promote the association. Below are five tips for designing a successful, accurate, and meaningful dashboard:

1. *Measure what is important to your members.* Don't rely on governance or on one focus group to determine what's important. Ask critical stakeholders inside and outside the association about what brings value to membership and how members appraise association success. A robust survey strategy will ensure that engagement opportunities are important to a wide range of members.

2. *Be forward-looking.* Dashboards are intended to show where you are going (not record where you've been). As such, use metrics that look to the future and align with strategic objectives. Associations should use dashboards to identify course corrections and address negative membership trends.

3. *Use objective metrics.* Clearly define objective measures of engagement, and specify the data sources and collection methods. Avoid measures that require extensive explanation or can be misinterpreted. Start with the organizational metrics and break them down into component initiatives, programs, and processes that can be used to track individual engagement behaviors.

4. *Be universal.* Identify measures that can be used to track changes in engagement behaviors across generations, disciplines, and stages of professional development. Avoid measures that apply to only one segment of the population or that cannot track changes in engagement behavior across the career or life span.

5. *Be accurate and truthful.* For a dashboard to be effective, it must have the correct data. Be wary of selecting "rose colored" metrics that lead to self-fulfilling prophecies. Instead we encourage honesty when entering both positive and negative data. Share these data with gover-

nance. Transparent data will foster credibility and openness. Conversely, do not suppress or deflect areas of weakness. Covering up and avoiding problems is a guaranteed strategy for losing members in the long run.

## Conclusion

The decision to join an association is not a simple cost-benefit analysis for most individuals. Price is certainly a key determinant of association membership, but the relative value of membership is much more complex and determined by perceptions of how well personal and professional needs are served at each career stage, an understanding and appreciation of the association's impact on the discipline and society, and perception of the value and merits of being actively involved with the association. Healthy organizations allow multiple engagement opportunities in areas valued both by the organization and the individual member. P&P recommends that APA and its affiliated associations develop mechanisms, such as an engagement dashboard, to delineate and track levels of engagement ranging from simply becoming a member, which contributes funds and credibility (through numbers represented), to becoming a highly engaged governance or advocacy leader. This report provides a framework for association leaders to conceptualize and assess objectively how cognitive, attitudinal, demographic, and professional development factors influence member perception of value. In addition, it offers the APA and its affiliated associations a roadmap to define and target precise engagement opportunities, to create and measure membership strategies, to coordinate and maximize resources across membership cohorts and across organizational units, and to enhance the overall value of membership.

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