American Occupational Therapy Association (AOTA)

Report on Qualitative Research Results for Association Participation Review

May 2009

Prepared by:
Paul D. Meyer, CAE
Principal Partner
Tecker Consultants, LLC
703.449.9019
pmeyer@tecker.com

Introduction

The qualitative research was conducted to assist the AOTA in reviewing current member participation as well as future opportunities. A variety of stakeholder groups were identified as important knowledge-bases to assist the Ad hoc Committee in conducting the review and creating recommendations for the future. Two types of qualitative research mechanisms were utilized, focus groups and one-on-one telephone interviews. This report provides a summary of the information collected from the research conducted.

The objectives of the research were to:

- Engage important stakeholder groups in information collection used to assess their views on the current and future conditions related to participation in AOTA.
- Provide insights into how the AOTA could better align the opportunities to participate with the wants, needs, and preferences of volunteer leaders and the association.
- Assist in preparing the Ad hoc Committee and staff for further discussion and deliberation.

TECKER CONSULTANTS
Research Strategy Learning

Confidential and Proprietary © 2009 Tecker Consultants, LLC

Methodology

The research tools were developed and led by Paul D. Meyer, Principal Partner, Tecker Consultants. Paul is the primary consultant engaged with the AOTA in facilitating the strategic planning process. The research was conducted in February – May, 2009.

To ensure confidentiality of those participating in the research, specific names are not used in this report. References to gender or other identifying characteristics have been deleted to avoid revealing the source of particular comments. For the purpose of adding value to the findings, selected direct quotes ("Illuminating Quotes") are included in the report and are indicated in quotation marks without reference to source.

It is important to note that qualitative research, such as the focus group and telephone interview results represented in this report, are useful in exploring the range of opinions on a subject of interest or in identifying issues and concerns. However, due to the small number of participants, the results should not be interpreted as representative of the complete population of members and others.

Confidential and Proprietary © 2009 Tecker Consultants, LLC

Member Telephone Interviews

25 telephone interviews were conducted in February and March 2009. Stakeholder groups represented in the telephone interviews included:

- Past and current RA members
- Past and current committee/task force chairs and members
- Active state association members

A questionnaire prepared by Tecker Consultants guided the discussions. Interviews included asking specific questions outlined in the questionnaire along with extemporaneous conversations as a result of issues raised by participants. Some additional questions were added to the questionnaire as participants surfaced new issues. Each interview lasted between 30 - 40 minutes.

TECKER CONSULTANTS
Research Strategy Learning

Confidential and Proprietary © 2009 Tecker Consultants, LLC

Focus Groups

Four 1.5 hour focus groups were conducted with the following stakeholder groups: staff liaisons to volunteer work groups (committees and governance), students, young professionals and active members. With the exception of the staff focus groups, the other three groups were conducted during AOTA's Annual Conference, April 25, 2009.

A focus group moderator's guide was prepared by Tecker Consultants. Focus groups included asking specific questions outlined in the questionnaire along with extemporaneous conversations as a result of issues raised by participants.

Focus group attendees were recruited by AOTA staff. The focus groups were facilitated by Paul D. Meyer, Principal Partner, Tecker Consultants and primary consultant to this project.

Confidential and Proprietary © 2009 Tecker Consultants, LLC

Key Findings

Word/Phrase Describing AOTA Participation

When asked to provide the first word or phrase that comes to mind describing research interviewee's experience participating in AOTA, the majority of comments focused on ***the opportunity to network with other colleagues or contribute to the profession.***

Other words or phrases mentioned:

- Professionalism
- Personal growth
- Rewarding
- Dwindling interest
- Grassroots
- Difficult to recruit new people (state level)
- Supportive
- "Old ladies club"
- Distant
- Unsatisfying
- Stimulating

TECKER CONSULTANTS
Research Strategy Learning

Confidential and Proprietary © 2009 Tecker Consultants, LLC

Definition of Participation

Most research interviewees defined participation as an act of contributing voluntary time to the association in order to accomplish an activity or provide content expertise. There was acknowledgment by many that participation preferences are changing. Most emphasized the importance of networking with colleagues in accomplishing the task. Some research participants expanded the definition to include activities such as actively using the website, attending the conference, taking action on a legislative issue, interacting online with colleagues, and renewing membership.

Illuminating Quotes:

"The networking is really important. Participation wouldn't be the same if I didn't interact with other OTs."

"I think people define participation in different ways. The association has to be prepared to meet their (changing) preferences…(because) people have less time and are more comfortable with new technologies."

"You have to give some people credit just for renewing (membership). (Renewing) shows your commitment (to the association) and defines a certain level of participation."

"For me, participation requires some level of doing."

TECKER CONSULTANTS
Research Strategy Learning

Confidential and Proprietary © 2009 Tecker Consultants, LLC

Definition of Participation *(Continued)*

Illuminating Quotes (cont):

"(The definition) has to include networking and collaborating with others."

"I think the definition is changing. Participation is now being defined as involvement with each other rather than with an organization…technology is encouraging people to interact directly with each other (rather than through an organization)."

"(Participation) is defined by the individual. Some prefer planning events while others like contributing to a white paper. For me, participation includes the opportunity to contribute to the future of my profession…something that has a lasting impact."

"Participation used to be for only those that were invited (to participate). Now, anyone should be able to participate (because of technology tools)."

"We need to do a better job matching (member) preferences to the activities that need to be done…(because) people have different preferences and define participation differently."

"I think more and more people define participation by going to the website. Having a website has enabled people who couldn't afford to attend meetings the opportunity to get information and connect with people."

TECKER CONSULTANTS
Research Strategy Learning

Confidential and Proprietary © 2009 Tecker Consultants, LLC

Why volunteer?

The majority of survey participants first volunteered because they were **asked by an active volunteer member or AOTA staff**. The reasons why they volunteered varied:

- Obligation/responsibility to give back to the profession (most often given).
- Interest in networking with colleagues.
- "Arm twist."
- Interest in serving in a leadership position within AOTA.
- Desire to see change.
- Career enhancement.

Illuminating Quotes:

"Members respond better when they are personally asked to participate."

"People feel honored to participate when asked. Since it's difficult to know how to participate, when you're asked you feel flattered and are more likely to participate."

"I've served wherever I've been asked to participate."

"I was asked by my mentor and was told, 'The greater the effort, the greater the reward.'"

Confidential and Proprietary © 2009 Tecker Consultants, LLC

Why volunteer? *(Continued)*

Illuminating Quotes (cont):

"Most people come into the organization because they are asked. There is not a system in place to sign up to be a volunteer."

"It doesn't appear that people participate out of obligation anymore. This is a change. They respond because someone recognizes their value."

"It was told to me as a student that if you want to be a professional, you need to be active (in your professional association)."

"I had a boss who encouraged me to get involved. She was a mentor to me."

"It's an opportunity to give back to the professional. It should be viewed as an honor to serve. I certainly felt like it was (an honor)."

"There's lots of 'arm twisting' (on the state level) to get people to participate. People don't naturally sign up to be involved…especially today. It's difficult to get on someone's radar screen these days…people are really busy in their jobs and don't have time to even think about volunteering."

"I think once people volunteer they enjoy it and are willing to do more, but, initially, they need to feel wanted. They need to be invited."

"I got involved because I desired to make a difference. I recognized that the only way you can truly make a difference is to get involved."

Confidential and Proprietary © 2009 Tecker Consultants, LLC

Preferences for Type of Work

When asked what activities would be most fulfilling to participate in, the majority expressed interest in **content areas that would impact the future positioning/success/growth (standards, public policy, advocacy) of the profession.**

Illuminating Quotes:

"The opportunities that are perceived as 'thinking groups' are much more appealing than the 'doing groups.'"

"It's perceived as 'more sexy' (to be involved in lobbying/advocacy). It's exciting to come to D.C. to lobby…you really feel like you are making a difference."

"Since (AOTA) staff downsizing, volunteers have been asked to do more report writing. It's difficult to get members to give up their time to write a report…of course they are always willing to volunteer, but they are limited by how much time they can spend…they are more willing to contribute to the content of the report."

"It's really rewarding when you give your time and see that you've made a difference for future generations entering our profession….it's important to see the longer-term view."

TECKER CONSULTANTS
Research Strategy Learning

Confidential and Proprietary © 2009 Tecker Consultants, LLC

Preferences for Type of Work *(Continued)*

Illuminating Quotes (cont):

"I think the association has wasted a lot of time debating issues and when you really think about them (the issues), they usually don't have any real significance to future success (of the profession). We should focus our attention on what will really have an impact."

"There is a difference (in participating) on the state and national levels. On the state level, you get more involved in organizing programs, more administrative…and advocating. The time commitment is more intense (on the state level)…(on the national level) you are more involved in policy development…It probably depends on where you are in your career, but I would guess people prefer to have an impact on policy over planning a meeting."

"I think it's important to recognize members for their expertise rather than their 'free labor.' There is nothing wrong with asking people to help out (on the state level), but I would rather contribute to the national agenda."

TECKER CONSULTANTS
Research Strategy Learning

Confidential and Proprietary © 2009 Tecker Consultants, LLC

External Issues Impacting Participation

The primary issue identified by the majority of research participants impacting their ability to be involved in organizations is **time constraints**. Most agreed that time pressures had increased in the last three-five years and will continue to increase going forward. Reasons for time pressures included:

- Increased paperwork.
- Increased time spent on email and social media.
- Greater patient loads.
- Greater pressures in balancing work and family.
- 24/7 access.
- Less staff in practice setting.
- Greater teaching loads.

Illuminating Quotes:

"Even though I've been working for over 20 years, I'm much busier today than I was when I first started."

"Members are torn…(because) they have such a passion for their profession, but cannot find the time to participate."

TECKER CONSULTANTS
Research Strategy Learning

Confidential and Proprietary © 2009 Tecker Consultants, LLC

External Issues Impacting Participation (*Continued)*

Illuminating Quotes (cont):

"It's gotten to be a 24/7 environment. I'm constantly bringing work home…paperwork and catching-up on email."

"Since I now work more in the evenings, both on paperwork for my job and association work, I want to keep my weekends free. This is my family time. Time is limited during the week (for family) so weekends get blocked off as family time."

"It's very difficult to get members to give up time during the day, even for a conference call. We now have to schedule calls in the evenings."

"I see staff spending so much more time on email and other stuff like blogging and they (then) have less time for other activities. (Participation in the association) suffers and will continue to suffer even more."

"People are working longer hours especially in this economy. This affects their ability to serve."

"The paperwork we now have to do is over-the-top. I entered this profession to work with people not fill-out lots of forms."

"Time is the real issue. If we can figure out how to get what needs to be done in less time, I will be very happy."

"I have to take leave in order to volunteer. I have plenty of leave, but it's getting the time to take it that's the real challenge."

Confidential and Proprietary © 2009 Tecker Consultants, LLC

Ease of Participation on the National Level

Most research interviewees agreed that there is a perception that it's not easy to participate on the national level. Some compared national participation to state participation and agreed that it's much easier to get involved at the state level.

Illuminating Quotes:

"It seems very difficult to give back at the AOTA level if you haven't already been involved. It's hard to just get plugged in…it's pretty much the same people who always get involved."

"Involvement (in AOTA) seems very distant. It's far away especially for those on the west coast."

"In some ways, it's easy to connect (with the national)…for example going to the website, but in other ways, like serving on a committee, it's very far off."

"The conference makes me so connected, but as soon as I get home, I feel so distant (from AOTA)."

"When I was a student it was easier to get involved (in AOTA). It seems more difficult as a practitioner."

"I prefer (participating) on the state level…because you get a more direct and immediate benefit. This does not seem to be true on the national level. Everything has to go through so many layers."

"If you don't have the right acronyms, it's difficult to get involved. It's definitely elitist."

Confidential and Proprietary © 2009 Tecker Consultants, LLC

Face-to-face Participation

Overwhelmingly, research interviewees prefer face-to-face participation over "virtual." However, there were some areas for consideration. For example, younger people interviewed preferred face-to-face, but were more comfortable and accepting of other options compared to older research participants. Given increased time constraints expressed by most interviewees, many were indifferent about what was most important – face-to-face or saving time and money.

Note: Some participants that were engaged in the virtual RA meeting felt that the time commitment for the virtual meeting was as much or more than the face-to-face meeting (this group represented a small sample of the total research pool).

Illuminating Quotes:

"I prefer face-to-face because there is so much more to the meeting than the work…seeing friends and networking is also important."

"I prefer face-to-face meetings, but am constantly engaged with others online. Yes, I'm very comfortable getting work done online."

"We get much more accomplished in a one-day face-to-face meeting than in several (conference) calls spread over weeks."

Confidential and Proprietary © 2009 Tecker Consultants, LLC

Face-to-face Participation *(Continued)*

Illuminating Quotes (Cont):

"You have to remember that we are a profession that enjoys people. We wouldn't have become OTs if we didn't like interacting with people. We are a face-to-face group."

"I know that the association is going through difficult times, but we are going to loose a lot if we get rid of face-to-face participation."

"(Because of job demands) I don't have time for face-to-face meetings anymore although I prefer them. It's unrealistic to think that people will be able to fly to Chicago (for a meeting) when they can pick-up the telephone in their own office."

"I get more fulfillment from (face-to-face) meetings. They are personally more rewarding, but as I look to the future, I'm not sure OTs will have the time to go to meetings… especially when it includes travel time."

"This is a tough one for me. I value the face-to-face time at conference. I have also been frustrated by the amount of wasted time during (face-to-face) meetings. Okay, we need to maintain face-to-face opportunities for networking, but could get more of the work accomplished through virtual meetings at least on the national level (as compared to the state)."

TECKER CONSULTANTS
Research Strategy Learning

Confidential and Proprietary © 2009 Tecker Consultants, LLC

Representative Assembly

Overall, participation on the Representative Assembly (RA) was a positive and worthwhile experience for those research interviewees that had served in the past or are currently serving. Several people expressed concerns about the future. Some research participants that had not served on the RA questioned its long-term usefulness or relevance.

Illuminating Quotes:

"I had a very rewarding experience (on the RA). The people made all the difference. I still keep up with friends I made (while on the RA)."

"The average member feels much more connected (to their RA) than the (AOTA) Board. The RA provides a better connection. The Board tends (to be viewed) as elitist and the RA seems very approachable."

"It was invigorating (participating face-to-face in RA meetings). I really felt like I was contributing to something bigger than myself. I felt like I was being heard."

"The person we had in the position (RA rep) in the past didn't really communicate well, but our new person is doing a good job. (Success and commitment) really depends on the personality (of the representative). It's a position (RA) that is hard to fill and when you get a good person, you tend to try and keep them."

Confidential and Proprietary © 2009 Tecker Consultants, LLC

Representative Assembly Participation *(Continued)*

Illuminating Quotes (cont):

"The RA does not communicate (the representative views of their state) well to the organization and does not communicate back to the states very well. I don't think the RA is the answer anymore. There is not enough people that can see and contribute to the 'big picture'…people use it (RA) to take care of their own needs rather than the broader profession."

"No the communication is not that good (between RAs and state associations). It gets active around conference time, but then drops off. Without a consistent flow of information, you really don't feel connected (to the work of the AOTA through the RA)."

"(My experience as a member of the RA) was very rewarding. Our state has a process in place to collect opinions for (state) members and I frequently communicated back to them…(through) articles and presentations."

"I don't really know anything (about the RA). It sounds like it provides a voice for the membership (to the AOTA). I would like to have a voice as well…(although) I am not comfortable speaking for others…they can just ask me directly."

"Sometimes I wonder if they (the RA) realize what kind of impact they could actually have. They sometimes get caught up in things that, in the end, don't really have any significant consequences."

Confidential and Proprietary © 2009 Tecker Consultants, LLC

Virtual Meetings

There was significant recognition that an increase in virtual meetings is inevitable, but there were concerns expressed over the use of technology in accomplishing association work. There were four primary issues mentioned: inconsistent hardware, schedule challenges, technology training, and lack of "personal touch."

Illuminating Quotes:

"It's difficult to participate in conference calls in the evenings because I don't have the same access to a good phone at home like I do in the office. I have to stay later in the office to participate on the call…there are also too many distractions at home. "

"Often we waste a lot of time trying to figure out the technology and less time doing the actual work…you need to have access to technology support to be successful."

"You have to be a really good facilitator to manage conference calls. You could be really good at running a face-to-face meeting, but lousy at a conference call…there is a lack of training and skills."

"Trying to find a time when everyone around the country can get on the telephone is really difficult. It's really difficult out here (west coast). I either take calls early in the morning or right in the middle of my day..that's hard."

TECKER CONSULTANTS
Research Strategy Learning

Confidential and Proprietary © 2009 Tecker Consultants, LLC

Virtual Meetings *(Continued)*

Illuminating Quotes (cont):

"There are benefits to virtual meetings…more people can participate and you don't have travel costs, but the connection with people is so important. You cannot loose this."

"I am fine with technology. I just don't get as much pleasure out of looking at a screen instead of being is a room of people…the work can still get done (virtually)."

"I think meeting virtually allows more people to participate in the conversation. It broadens the 'think tank,' but makes it more difficult to make decisions. A smaller group then has to take the information (from the broader group) and create policies."

"Sometimes it feels like we are 'rubber stamping' (in virtual meetings) which doesn't create value. There is a sense of excitement when you are in a room with others. If technology can create that same experience (sense of excitement), I would much prefer staying home."

"We have to face the new realities of getting work accomplished. I think this recession is going to change the way we connect. We are forced to change, kicking and screaming, but in the end, more people will be able to participate in a shorter period of time (virtual participation). "

TECKER CONSULTANTS
Research Strategy Learning

Confidential and Proprietary © 2009 Tecker Consultants, LLC

Ultimate Participation Experience

Research participants were asked to describe their "ultimate association participation experience." A variety of answers were provided, although there were several consistent themes:

- Short time commitment.
- An assurance that participation will make a difference and have an impact on the future of the profession.
- The opportunity is focused and has identified outcomes.
- Follow-up on the impact of the work is provided.
- There is an opportunity to network with peers.

Other answers included:

- Feel part of the "inner workings" of AOTA.
- Appropriate recognition is given.
- Customized to meet individual needs.
- Low cost.
- Opportunity to influence the direction of AOTA.
- Staff support.
- Mentoring.
- Opportunity to build resume.
- Creates an opportunity to provide opinions as broadly as possible.

Confidential and Proprietary © 2009 Tecker Consultants, LLC

Ultimate Participation Experience *(Continued)*

Illuminating Quotes (cont):

"I want to be used for my knowledge and expertise…ask me what I think and then let me get back to my work…make sure you tell me how it was used, though, and if I made a difference."

"We are a profession of people serving people. Collaboration is very important."

"I had a very negative experience volunteering. I will never do it again…disorganized and unrealistic timelines…recommendations were turned down…big waste of time. "(The) RA said that they wanted it (a certain product) and then they changed their mind after we spent all this time (creating recommendations)."

"A little recognition doesn't hurt although that is not why I volunteer, but it's always nice to know that you're appreciated."

"We really need to think about how we can broaden the number of voices heard (rather than less voices). We want to remain volunteer driven."

"(It's an) interesting question. My experience has been so positive, my first answer is we need to do more of the same, but I would have to say that the people make the difference. If we cannot get people to participate (in the traditional models) we may need to change our ways."

TECKER CONSULTANTS
Research Strategy Learning

Confidential and Proprietary © 2009 Tecker Consultants, LLC

Ultimate Participation Experience *(Continued)*

Illuminating Quotes (cont):

"We need to do a better job fitting talent with need…this is difficult when you rely on others to appoint volunteers to positions." *(note: I think this is referring to RA selection)*

"The mentoring I received as a student (participating in AOTA) had an enormous impact on my professional development and my willingness to stay involved despite pressures to become disconnected."

"Students are our future. More are participating today than in the past. We need to be comfortable with social media in order to keep them engaged."

"This is tough because I know that what I really prefer is becoming less possible. Okay, I prefer a face-to-face meeting in a relaxed setting with 'big thinkers' brainstorming the future of our profession…and I don't have to pay for it or figure out what to do next."

"A short-term commitment where promises are kept (deadlines and time commitment) and I feel like my expertise is needed and contributes to the final outcome."

"I think it's important that everyone who wants to can participate…although everyone doesn't need to be involved in the final decision-making."

TECKER CONSULTANTS
Research Strategy Learning

Confidential and Proprietary © 2009 Tecker Consultants, LLC

Future Considerations

Research participants provided ideas for consideration regarding future association participation:

- Create more opportunities for all members to participate.
- Enhance collaboration and inclusion between and with networks(?).
- Create opportunities for greater sharing among colleagues on practical techniques and the application of theory.
- Create opportunities for mentoring.
- Enhance opportunities for networking after the conference between attendees.
- Create more opportunities for “informal” networking.
- Allow more members to contribute their “voice” to issues.
- Enhance the technology and increase training on how to use technology for virtual meetings.
- Create opportunities for students to have a voice at all levels of the organization.
- Create opportunities to align member interests and expertise with volunteer tasks.
- Create greater clarity between volunteer opportunities on the state level versus national.

Confidential and Proprietary © 2009 Tecker Consultants, LLC