



AMERICAN ASSOCIATION FOR PUBLIC OPINION RESEARCH

AAPOR STRATEGIC PLAN

AAPOR Council

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Introduction

It has been three years since AAPOR's Executive Council last approved its strategic plan. The 2010 plan set three broad goals for the association:

- Increasing AAPOR's effectiveness;
- Increasing AAPOR's value to its members; and
- Increasing AAPOR's value to society and the field.

AAPOR has made substantial progress on all of these goals, yet there is still much to accomplish. Both AAPOR and the survey and opinion research fields have continued to evolve and face challenges. Accordingly, AAPOR Council has undergone a strategic planning process to refresh the 2010 plan and focus on what we believe are the most pressing needs of our industry. This revision provides a road map for the organization for the next three to five years.

Partly as a result of the previous plan, AAPOR has grown considerably, as we detail below. In addition, the nature of our membership is changing. A plurality of AAPOR members reported affiliation with academic institutions in 2010. By 2013, both the academic and commercial sectors account for just over a third of AAPOR's membership – 37 and 35 percent, respectively. Over a forty percent of our members who reported their highest degree have a Ph.D., and roughly another third report having a Master's degree. In addition, students make up a growing share of the membership. Moreover, the industry itself is also changing rapidly. Important societal and technological changes pose new challenges to telephone and face-to-face surveys and the rise of on-line panels, especially panels consisting of self-selected volunteers, have led to new questions about the need for probability samples.

This plan represents Council's attempt to address these changes and to build on the previous plan. It extends some of the goals from the earlier plan and it adds some new ones. It restates the core values that have guided AAPOR since its founding, offers an analysis of

AAPOR's position both with respect to its internal dynamics and the external environment, and proposes a set of key initiatives to guide AAPOR's Executive Council over the next three to five years. As with the 2010 plan, we expect this to be a living document that will be periodically reviewed and revised by each incoming Council so that, as society and the field continue to change, AAPOR keeps pace.

The Mission of AAPOR

Most professional associations have a mission statement or some similar expression that articulates the organization's core values. While it is clear that AAPOR has long-standing core values, there is no clear brief statement of them. Based on the by-laws and other documents, the Executive Council has adopted the following mission statement:

AAPOR is a professional organization dedicated to advancing the science and practice of survey and opinion research to give people a voice in the decisions that affect their daily lives.

We strive to:

- *Educate policy makers, the media and the public at large to help them make better use of surveys and survey findings;*
- *Educate practitioners on new developments affecting our field;*
- *Advocate the highest standards of ethical conduct for survey and opinion research;*
- *Encourage and disseminate research and innovations that improve our methods;*
- *Encourage and disseminate systematic analyses of public opinion on the major issues of the day;*
- *Promote best practices in collecting, analyzing, and interpreting survey data;*

- *Provide opportunities for our members to exchange views and promote the values of our organization; and*
- *Act as an advocate for survey and opinion research and its practitioners.*

AAPOR's Current Situation

The starting point for any organization's strategic plan should be a realistic assessment of the organization's current situation — both its strengths and weaknesses and its position within an environment that poses potential threats to the organization but also offers opportunities for it. The Strategic Planning Task Force (and later the full Council) undertook such an assessment of the association's current situation. The results are briefly summarized here.

AAPOR's Strengths. AAPOR strengths are numerous and reflected in the continued growth and vitality of the organization - despite the soft economy and increasing threats from low-cost, poor-quality alternatives in recent years. The growing and loyal membership base is a key to the association's success. AAPOR continues to be the professional organization of choice for an ever-growing number of people as evidenced by the annual increase in members and conference attendance. AAPOR has grown 52 percent, from 1,571 in 1999 to 2,388 in November 2013. This represents an annual growth rate of 3 percent over 14 years. Likewise, the annual conference continues to enjoy great popularity and often sets record attendance levels. In 2013 the number of attendees to the Boston conference was 1,152. While other professional organizations have been experiencing stable or declining membership during the economic downturn of the past several years, AAPOR's growth has continued an upward trajectory for more almost a decade and a half. This steady growth has come primarily from an influx of new members rather than greater success in retaining past members. As a result, new members represent an ever larger proportion of the organization. In 2013, just over 20 percent of AAPOR's members were *new* members, who had joined the organization for the first time

during that year. This is the same proportion of new members as that of 2010 when the strategic plan was first released.

AAPOR is also well served by a large and dedicated cadre of long-term members, serving as a leadership core for not only the Executive Council, but also numerous task forces and committees. These are staffed by volunteers, who devote many hours to the organization each year. This volunteerism along with the willingness to share professional information openly and mentor those new to the profession and organization are important long-standing features of AAPOR's culture and critical building-blocks for allowing the association to thrive in the future. In part, this loyal membership base is a product of an active group of regional chapters that offer opportunities to engage new members and help prepare them for future roles as leaders of the national association.

Another important resource for the organization is the professional diversity of AAPOR's membership. Although the academic sector claims a plurality of AAPOR's members, it still constitutes only about a third of the total. The government and commercial sectors of the industry are also well-represented. The presence of a large number of survey and opinion researchers from government assures close ties to the federal agencies that sponsor many of the largest and most important surveys done in the United States. In addition, AAPOR draws members from a diverse set of disciplines, including political science, sociology, psychology, communications, economics, statistics, and other fields.

AAPOR's commitment to providing continued educational opportunities for members and others in the profession is long-standing and become even more of a focal point in recent years. With a more robust infrastructure and resource support, AAPOR has consistently provided a wide array of educational offerings, content, and formats.

Still another organizational strength is that AAPOR is a recognized brand within the survey and opinion research industry. In addition to its members and leadership, the association's reputation and image are driven by several factors: its Code of Professional Ethics

and Practices (and its efforts to enforce this code); its well-respected journals, *Public Opinion Quarterly* (POQ) and *Survey Practice* (SP) along with the newly launched *Journal of Survey Statistics and Methodology* (JSSAM) in conjunction with the American Statistical Association; its premier online discussion forum, AAPOR-net; and its well-attended annual conference. All of these are important organizational assets. In addition, AAPOR's white papers and task force reports are increasingly influential throughout the industry at large and its annual awards provide recognition of the best works being done in the field.

A final strength is the increasingly professional management of AAPOR. Over the past decade, AAPOR has become a more professionally-run organization, combining the best elements of a professional management service and a leadership team of dedicated volunteers. The result has been continued annual growth over the past several years despite a downturn in the economy. This has placed AAPOR in a strong position with good financial health and stability.

AAPOR's weaknesses. Like any large and diverse organization, AAPOR has issues which need to be addressed or at least noted and monitored. Although volunteerism is a key strength of the organization, AAPOR's reliance on volunteers for many organizational tasks has led to some weaknesses. This shows on several fronts. First, in the absence of clear guidelines, there is often unnecessary overlap and confusion among the various association committees and subcommittees. This can lead to delays in accomplishing important initiatives or duplication of efforts and confusion on the part of members. Second, in many areas AAPOR has no standard operating procedures for dealing with routine issues and, in other cases, its operating procedures are at best poorly documented. These failings reflect our tradition of keeping investments in staff low and reliance on volunteers high. Third, and perhaps most importantly, this lack of professional organizational capacity has hindered AAPOR's ability to move on a number of important initiatives, including new revenue generation, expanded resource portfolio management, and educational and other membership-related activities.

In recent years there have also been growing concerns about several aspects of AAPOR's flag-ship event: the annual conference. While attendance on average has continued to climb in recent years, so too have the voices of those concerned about the cost of attendance, particularly for government, academic and student members. It has also been noted that the conference is increasingly lacking in terms of subject matter diversity with an increasing proportion of "methodological" over "public opinion" papers being submitted for consideration and, hence, selected for presentation.

As with many professional organizations, the members of the governing board of AAPOR serve for relatively short terms (mostly two years). This high turnover on the Executive Council can lead to a lack of consistency of purpose over the long haul. This situation is compounded by the lack of clear pathways from "volunteer" activities to elected office, creating potential frustration for individuals and reducing the apparent talent pool for those who may be interested in serving in an elected office position. Although there have been efforts to bring in new leadership to Council, many of AAPOR's members see the Executive Council as an unapproachable elite.

From a financial perspective, AAPOR is generally in good health; however, it does lack financial diversification of its resources. The great majority of AAPOR revenues come from dues and annual conference fees, most of which are paid by individual members. Although corporations may pay membership dues and conference fees for their employees, the direct contributions of corporate sponsors make up a minor portion of AAPOR's annual budget. AAPOR has only a small endowment and its revenue sources are limited to membership dues, the conference, and *POQ* subscriptions. While some progress has been made, AAPOR lacks a clear, integrated plan for identifying and pursuing alternative sources of revenue as well as a strategy for how best to invest and utilize these funds. Lack of organizational capacity has been a major factor hindering progress in this area as well as other desired initiatives.

Several additional weaknesses which keep AAPOR from realizing its true potential are worthy of note:

Lack of racial/ethnic diversity within the association -- Except for a few ad hoc activities over the years, AAPOR has not put together a serious sustained effort to attract researchers from a variety of racial/ethnic backgrounds.

Sizable proportion of members appear to not adhere to AAPOR's Code of Professional Ethics and Practices -- Whether due to ignorance or willful neglect, this threatens to undermine AAPOR's standing to speak authoritatively about best practices and hold those found to be in violation of the code to account through AAPOR's standards process.

Lack of sustained and coordinated planning between AAPOR and "sister" organizations such as the World Association for Public Opinion Research (WAPOR), the American Statistical Association (ASA) and ESOMAR on topics and activities of mutual interest -- Given the many challenges and opportunities in the fields of survey, opinion and market research, the full benefits are not being realized on an on-going basis, such as joint task forces, education offerings, and special topic conferences. Cross-organizational activities that do take place are often handled on an ad hoc basis at the request of interested parties -- not driven by a well thought-out strategy.

AAPOR's Opportunities. There is no doubt that AAPOR is experiencing a time of change and renewal which offers a range of opportunities for the association to grow, thrive and lead. The continual diversification of data, methods and specialties within the fields of opinion research is one AAPOR should embrace, encourage and provide substantial leadership. The launch of *Survey Practice* and the *Journal of Survey Statistics and Methodology* recognized the need for additional outlets for research of various foci and have been the perfect compliments to AAPOR's flag-ship journal, *Public Opinion Quarterly*. These journals continue to serve several key purposes, providing platforms for researchers to share knowledge on issues of importance

to the field, reaching an even broader array of potential members, generating revenue, and building AAPOR's brand.

Likewise, AAPOR's task forces have served to inform not only the research industry on items of great importance (such as the rise of cell phones, the challenges of nonprobability methodologies, and the importance of public opinion in policy and decision-making), but end users and beneficiaries of opinion data as well. AAPOR has the opportunity to expand its current reach and impact by providing leadership of task forces on emerging issues like "Big Data"/"Organic Data" and doing so in cooperation with other organizations of similar interests.

Building stronger and more routine ties with other organizations in the field can also be of great benefit to AAPOR, in terms of increasing membership, identifying emerging leaders, growing revenue, and expanding influence. AAPOR has a wide range of regional and local chapters, which operate in large part independently from the national organization (often by design). There are many mutually beneficial activities, however, which could be coordinated on a more on-going basis between AAPOR and its chapters, including promotion of more explicit pathways for strong and interested Chapter leaders to be recognized and considered for national elected and key unelected AAPOR positions; co-sponsoring/co-coordinating "mini-conferences" at a regional level -- these may be special topic forums or "highlights" from the national conferences for those who could not attend; and, expanding AAPOR's educational and training offerings.

There is much AAPOR can do at the international level as well in strengthening ties with "sister" organizations (WAPOR, ASA, ESOMAR and others) through joint task forces, educational offerings, and cross-sponsorship of sessions at each associations' annual meetings. Also, in recognition of AAPOR's growing impact internationally and the rising need for guidance and training on quality research practices in many parts of the world, AAPOR should

move to change its by-laws which currently prevent chapters from being formed outside of the United States. Such actions are critical as AAPOR continues to take on and embrace greater international recognition, members, and leadership.

As AAPOR continues to mature as an organization with greater professional support and resources, the association should look to expand the potential for revenue generation. Additional resources will allow the association to continue to grow important programs, such as education offerings. These would include initiatives to reinvigorate and promote sustaining sponsorships, organization memberships (which would require a change in AAPOR's by-laws), effective engagement and retaining of student members, and periodic events, such as regional "mini-conferences.

Perhaps no initiative has demonstrated greater realized promise than AAPOR's focus on expanding and routinizing its educational and training opportunities over the past several years. Education and training will continue to play a critical role in AAPOR's success. It offers a variety of vehicles for promoting best practices within the industry, reinforcing the importance of Transparency, and sharing the latest knowledge with others in the field. It is also a critical component of AAPOR's brand awareness and promotional activities. The market is ripe for expanded offerings and products (webinars, short-courses, sharing courses with other associations, etc.).

Finally, with the publication of the task force report on "*Polling and Democracy*" the association has a unique opportunity to reinvigorate its focus on public opinion as an output and discipline. Public opinion is critical to a range of policy-making and decision-making activities across a spectrum of topics and at every conceivable level. Many of the task force recommendations provide a basis for promoting this form of research and attracting (or in some instances attracting back) researchers who specialize in these areas. This would help to ensure greater subject matter balance within the membership, leadership, annual conference and other

important AAPOR activities and will help to ensure a healthy diversity of thought and perspectives within the organization.

AAPOR Threats. First and foremost, AAPOR faces the twin threat of continued challenges with the conduct and cost of probability based survey (declining response rates, few alternative measures of quality, increasing costs) and the rapid growth and lack of transparency of nonprobability methodologies not only for online surveys but for use with other collection methodologies as well. AAPOR's recent task force report on *Nonprobability* provided a good basis for understanding some of these limitations; however, AAPOR's next step activities remain undefined in this area.

A second obvious threat is the growing indifference to survey quality in many quarters and, at worst, an apparent lack of awareness of sound research methods among many practitioners. Many customers seem to want data, but are not concerned about whether the data are likely to be accurate and reliable. Various forms of "junk" surveys are widely seen as credible; the flip side of the public's fascination with polls and surveys is its willingness to take the results from poorly designed ones just as seriously as those from rigorous designed studies. Because the barriers to entry in the field have gotten lower (it can be very inexpensive to field a web survey or to collect information via IVR), very inexperienced researchers can claim to be "pollsters" or survey researchers.

Third, although the field as a whole has weathered the economic downturn fairly well, some pockets of the industry have been hit hard. The budgets of the survey labs at state universities seem to be in trouble with a number of survey labs closing in recently years. Likewise, at the federal level there are continual threats to budgets of both key statistical agencies as well as some of the critical studies which they conduct, like the American Community Survey.

Fourth, the industry is affected and in some cases threatened by larger societal trends. Data collection technologies continue to change, the public is increasingly concerned about

privacy issues (and there is a new legislative and regulatory environment in response to these concerns), and it is still difficult for many potential respondents to distinguish surveys and polls from marketing calls. Many of these trends have driven up the cost of surveys.

Finally, although there are many fields that collect or use survey or public opinion data, including political science, market research, and statistics, AAPOR faces stiff competition from other professional associations (such as the American Political Science Association, the Marketing Research Association, and the American Statistical Association) for the allegiance of practitioners of these fields. AAPOR has not done an especially good job of systematically communicating its unique value and points of differentiation from these other associations. Even AAPOR's name (*American* Association for Public Opinion Research) may be hindering the associate's ability to attract new members from certain quarters and attain full recognition of the organization's growing international importance.

Strategic Initiatives for AAPOR (*from the 2010 Strategic Plan*)

To deal with the challenges that AAPOR faces, AAPOR has planned ten strategic initiatives over the next three to five years. These ten initiatives are organized around three major goals:

- Increasing AAPOR's effectiveness;
- Increasing AAPOR's value to its members; and
- Increasing AAPOR's value to society and the field.

Increasing AAPOR's Effectiveness

Initiative 1: Improving the governance of AAPOR. As the association has grown, it has attempted to cope with its expanded management by increasing the level of its administrative staff, turning to an outside organization (currently the Sherwood Group) that specializes in managing professional associations to provide greater and more experienced staff resources for carrying out its administrative functions. But while AAPOR's staff arrangements have changed over the last decade, its governing structures — Council and the various committees that work with Council — have not undergone a comparable overhaul. Thus, the first major initiative is a task force that will be charged with making recommendations for improving the operation of AAPOR's Executive Council and the standing committees. These recommendations should deal with a range of issues, including:

- the number of offices on the Executive Council;
- the specific offices on Council (e.g., Should there be an elected chair for education programs? Should the Secretary-Treasurer position be divided in two?);
- the terms that Council members serve (Should there be additional offices on Council other than the president with terms longer than two years? Are there alternative methods for promoting greater continuity on Executive Council over time?);
- the definition of the academic and commercial sectors (Should non-profits be grouped with the academic sector? Should government?)

- the potential value of a smaller executive group within Council that might speed decision making rather than requiring that all issues, large and small, be vetted, discussed and voted upon by the full Council;
- the adoption of a formal planning cycle in which new initiatives (and the associated budgets) would be discussed and adopted formally and proposed budgets for each of the committees would detail how the money will be spent;
- the development of an orientation and training program for new members of Council;
- the size, composition, and role of the standing committees;
- the development of charters for these committees to give them better guidance about their intended roles and operating procedures; and
- the potential cost implications of expanding the size of Council.

This list is intended to be illustrative, not exhaustive; the task force on governance should take a comprehensive look at AAPOR's governing structures with a view to improving the overall leadership of the organization.

One of these issues is worth discussing more explicitly. The task force should consider adding a new position to Council, a Chair of the Education Committee. Continuing education is a central function of AAPOR. Regardless of the nature of their initial training and activity in the field, all of the members of AAPOR can benefit from continuing exposure to developments, new procedures and techniques, challenges, opportunities, and research relating to their profession or discipline. The Educational Committee Chair's function would be to 1) help members convert research, new knowledge, and new theories in the areas of public opinion/survey knowledge into practice, and 2) in so doing, increase the value of AAPOR membership.

The task force on AAPOR governance should consist of eight to ten members, of which half should be current members of Executive Council. The remainder might be a mix of former Council members and other AAPOR members with experience on the governing boards of other professional organization. We envision this task force making interim recommendation to Executive Council within six months and concluding its work within a year.

Initiative 2: Fund-raising. A second component of the strategic plan is designed to increase AAPOR's capacity to move in new directions by expanding both its operating budget and its endowment. We recommend a committee headed by AAPOR's Secretary-Treasurer charged with 1) exploring how AAPOR's revenues can be increased and 2) developing a long-term fund-raising plan for the organization. This committee should include some members of the AAPOR Endowment Committee, which has also been working on fundraising issues. Potential sources of new revenues to be investigated might include more aggressive marketing of AAPOR's reports, journals, and other publications, and some form of membership for organizations. In addition, AAPOR needs to develop a long-term plan for increasing its assets through a sustained fund-raising effort. This committee will be responsible for developing this long-term plan.

Because continuity is critical to ongoing fundraising efforts, we envision that this group would become either a standing committee within the Executive Council or possibly folded into a reconstituted version of the AAPOR Endowment Committee; either way, a structure should be put in place to ensure continued work on fund-raising initiatives.

Initiative 3: Improving communications. For AAPOR to be effective, it needs standard processes for handling recurring communication needs, both within the organization and externally. Three areas in particular stand out as needing better, more consistent procedures: (1) press releases on emerging topics, (2) communication of new initiatives and other updates both to members and to those outside of AAPOR, and (3) dissemination of new research sponsored by the association (e.g., white papers and task force reports). To date each of these communication functions has been handled on an ad hoc basis, typically involving some level of coordination between the AAPOR President, Communications Chair, and the management service. These ad hoc arrangements can too easily lead to delays (or confusion) in the timely distribution of important information or, at worse, missed opportunities to communicate critical

information effectively. We recommend that a small committee headed by the Communications Chair examine these issues and develop more standard operating procedures to cover, at minimum, the three forms of communication listed above. These procedures should explicitly allocate responsibility for the development of content, but should also detail the recommended channels or mechanisms for distributing information to the targeted audience — AAPOR members, the press, the public, or other external groups.

In addition, the committee should examine the full range of communication vehicles that the association currently employs. Proposals to facilitate more effective communication include:

- A revamped website;
- Updated press lists and press/blogger release plans;
- Strategic use of AAPOR pages on Facebook, LinkedIn, and Twitter;
- Webinars on AAPOR white papers;
- A speakers bureau;
- A robust recognition program for participating organizations as part of the Transparency Initiative (see Initiative 10 below);
- Adding conference papers and presentations to Members' Only section of website; and
- A new logo and graphical design standards for the association.

Initiative 4: Strengthening cross-organizational relationships. AAPOR also needs to do a better job of building on its relationships with other organizations (such as WAPOR, ASA, MRA, ESOMAR, etc.) with which we share common interests for more effective communication, member training, and dissemination of ideas. While AAPOR has made use of such relationships in the past, typically our cross-organizational efforts have been episodic and have focused on specific issues or activities. AAPOR's leadership and its membership could benefit from establishing more formal, ongoing relationships with other organizations, particularly if

those relationships raised AAPOR's profile to the members of these other organizations. Stronger cross-organization ties could benefit AAPOR on a number of fronts, including diversifying the conference content and attendees, broadening membership in AAPOR, giving AAPOR a larger voice in issues affecting researchers and the public, and bringing AAPOR's values to a larger segment of the research community. Under this initiative, Executive Council would identify a committee to identify (1) key strategic partner organizations, (2) specific areas for cooperative initiatives of mutual benefit, and (3) processes to facilitate ongoing relationships with these organizations.

Increasing AAPOR's Value to its Members

AAPOR is a professional membership organization, and continues to exist only because individuals make the decision that the benefits of membership outweigh the financial and opportunity costs involved.

Membership in an organization like AAPOR typically provides personal benefits such as professional development, continuing education, opportunities for networking with fellow professionals, journal subscriptions, conferences, and employment and career information. Membership also enables professionals to support their chosen field by being a part of the field's interaction with the external world. Thus, one of the benefits of AAPOR membership is the opportunity it provides to promote the profession by enhancing awareness of the field's contributions, increasing public appreciation of the role and value of its practitioners, upholding quality standards and ethical practices, and conducting and disseminating research on significant issues that affect the field. But we don't know exactly why people choose to join AAPOR (or not), what specific benefits they expect, or how well we are delivering them. Thus, one of the first initiatives we propose under this heading is a membership survey designed to improve our understanding of why people join AAPOR and remain members, the benefits they seek from the association, and the new benefits they would like the association to provide.

One of AAPOR's continuing goals must be the adjustment of its programs and policies to stay closely in tune with the benefits desired by its members and prospective members. The increasing membership in AAPOR in recent years is a testimony to the fact that this process has worked well to date. Our recommendation is that more formal mechanisms be set in place to provide these benefits going forward.

Initiative 5: Develop a formal and on-going membership survey process. We recommend that AAPOR's Membership Committee develop an ongoing and systematic survey mechanism to provide continuing data from members. The survey should be designed to identify the value of existing membership benefits, perceptions of AAPOR's effectiveness in delivering these benefits, members' desires for additional benefits, and perceptions of AAPOR's ability to deliver these desired benefits. Personal benefits and benefits to the field should both be addressed by this survey. The results of the survey should be used by the Committee and by Council to adjust the AAPOR's programs and policies to increase AAPOR's value to the members. Another key function for this survey should be to track AAPOR's progress in reaching specific, quantifiable objectives on an ongoing basis. The objectives to be monitored will include those identified as a result of this strategic planning process. A regular series of surveys will enable future Councils to monitor progress towards its objectives in a systematic way and will provide a mechanism for gathering data on short-term issues facing AAPOR in particular years.

Although the specifics of the member surveys will be developed by the Committee, one possibility is to conduct these surveys in the early fall or to combine this effort with the post-conference survey. The most highly valued benefits and the most notable successes reaching specific objectives should be highlighted on the AAPOR home page and in marketing materials for prospective members. The results of the survey should also be actively distributed to the entire AAPOR membership.

Initiative 6: Conducting surveys of non-members. AAPOR's Membership Committee also should design and conduct a survey to provide data from non-members of AAPOR who might be induced to join or, in the case of lapsed members, to rejoin the association. This survey should also include other associations and companies that conduct or consume survey research. The survey of non-members and other organizations would assess perceptions of AAPOR, reasons that potential members are not currently members of AAPOR, and the educational functions and benefits that would be of most interest to potential members. This effort should also be designed to help Council understand how AAPOR is perceived in the industry at large and to assess the salience of the key features of the AAPOR brand.

Initiative 7: New educational programs. One of AAPOR's most important objectives is to provide continuing education to its members. Each year brings new and often dramatic changes in the field. These changes include developments in technology and in the methods through which population members can be reached by survey researchers, pressures from government and other regulatory agencies, changes in how public opinion and survey research is used, disseminated, and aggregated, and advances in the science of sampling and in our understanding of the process through which survey responses are generated. In the context of this strategic plan, education refers to the traditional "continuing education" of AAPOR members and does not include education of the general public or poll users.

AAPOR currently provides its members the major educational benefit of the annual conference, which includes short courses as well as the traditional sessions and panel discussions. In recent years, AAPOR has provided Task Force reports on key topics facing the industry, including most recently the Task Force report on cell phones and the Task Force report on online panels. AAPOR has also been involved in sponsoring webinars and in working with other organizations (e.g., the Poynter Foundation) to provide continuing education.

The Educational Committee — either the existing body or through a newly created of a new task force — should address the following issues:

1. The development of new educational opportunities for members, beyond those currently available through the annual conference. These should include mini-conferences, webinars, and training held in conjunction with regional AAPOR chapter conferences.
2. The development of new educational content that disseminates the results of task force reports and white papers (see Initiative 9) to members who wish to learn about best practices and the latest advances in public opinion and survey research science.
3. Education for members in documentation of the survey process, the importance of this for participation in AAPOR's Transparency Initiative, and the benefits of documentation for better and more cost efficient survey practice.
4. The creation of formal programs for continuing education that allow AAPOR members to receive certificates or citations, or some other form of continuing education credits.

Initiative 8: Creating sections and other opportunities for member involvement.

Many AAPOR members clearly derive satisfaction from their work for the association and their contributions to the well-being of the profession. Whether such activities involve election to Council, appointment to standing committees, participation in ad hoc task forces, or an active role in conference operations, members who are actively involved in the association have greater opportunities for networking, professional development, promoting standards, and supporting the field of survey and public opinion research. AAPOR also directly benefits, as active members are more likely to remain members and to recommend membership to their colleagues.

AAPOR has been well-served by this culture of volunteerism, but it is likely that there are many members who are currently uninvolved but who would be willing to help the profession and the association if they were asked. We recommend that new and expanded opportunities for involvement be created by the Membership Committee and by the task force on improving the governance of AAPOR (see Initiative 1). Opportunities for involvement should include

activities that help recruit and welcome young professionals and newcomers to the association and should include ad hoc tasks that do not require extended commitment. The Membership Committee may wish to consider the creation of an expanded database of volunteers and opportunities to track the frequency and depth of involvement by active volunteers and to identify uninvolved members who are willing to help if asked. The recent Transparency Initiative has garnered many new volunteers whose participation can lead to more active involvement and leadership in the Association generally. Fostering continued participation in AAPOR should be a key focus of the Membership committee

AAPOR members come from many different backgrounds and have different interests and professional responsibilities within the broad field of survey and public opinion research. Many professional organizations of AAPOR's size include formal sections, which allow members to enjoy the benefits of membership in a broad-based organization but at the same time provide the benefits of more focused interactions on the specific topics defining subfields and among the members with similar interests. Thus, a key component of this initiative is for the Membership Committee to examine the potential benefits of establishing sections for AAPOR. Within other organizations, sections play a key role in organizing sessions at annual conferences; in developing newsletters, listservs, and other targeted communications; in sponsoring journals; and in honoring distinguished members. The Membership Committee should examine which of these roles, if any, sections might play within AAPOR. The results of this examination should be formally presented to the Executive Council for a final decision on the creation of AAPOR sections.

Increasing AAPOR's Value to Society and the Field

In many ways, the field of survey and opinion research has entered a period of crisis. The validity of traditional methodologies is under serious challenge, and new, emerging approaches may not be as rigorously defined as previous ones. The dramatic and far-reaching changes in

the field pose a significant threat to the profession, AAPOR's members, and the long-term viability of the association. But AAPOR is also uniquely positioned to guide both practitioners and the public through this period, just as it has since 1947. AAPOR's history, its values, and the scientific orientation of its members give the association a decisive advantage in charting a new future for the profession.

In his 1998 Presidential Address then-president Jim Beniger articulated this possibility with specific reference to the Internet:

Today no professional association is better positioned than is AAPOR to lead the effort to exploit the Internet and the World Wide Web toward such ends. The longer we delay, however, in order to pursue much cheaper ways to implement methods in fact made obsolete by the Web itself, the more we will lose ground to those who do not initially share any of our natural advantages. The single advantage held by our competition — now mostly in college, graduate school, small start-up firms, or even high school — is that it will have grown up knowing no world which did not have an Internet, and more recently a Web.

If we begin today, it will much easier for us to learn what the competition knows than for it to learn what we already know. But every day we waste moving instruments from telephone interviews to the Web is a day's advantage lost, in my opinion. I'd like to see AAPOR pioneer the new survey research, as it did the old. How we might do this is for all of us to decide, collectively, once we decide — also collectively — that this is what we must do.

A dozen years later, AAPOR and its members are still struggling to pair the great benefits of the Internet with the scientific underpinnings of survey research. Much progress has been made, and those advances need to be better communicated within and by the association. The final two initiatives of the Strategic Plan are designed to enhance AAPOR's value to the field and to society through its role in establishing and communicating best practices for the field.

Initiative 9: AAPOR's Task Force reports and white papers. Over the last few years AAPOR has created task forces of members to study and comment on important methodological and other issues facing the field as well as suggest ways in which AAPOR and

individual members can maintain and promote high quality, scientifically sound, and credible survey and opinion research. The task force reports to date have proved an effective mechanism for disseminating sound practices to an audience that extends beyond the AAPOR membership.

These are important and valuable activities that should continue. However, there also is a good deal more that can be done to focus the scientific expertise of the AAPOR membership on the most pressing survey and opinion issues of the day and to proactively guide the ongoing evolution of the profession. Current practice seems to be for individual members to propose task forces through one of the standing committees (most often Standards), who in turn brings the proposal to Council. But no one either in the committees or on Council is charged with actively identifying areas of concern, developing a set of potential topics for study, proposing Task Force leaders, assisting in the recruitment of members, and overseeing dissemination to as wide an audience as possible. This should change and Council should vest a clearer responsibility in the Standards Committee to:

- Establish at least one or two new task forces each year;
- Identify a chairperson for each and assist in the recruitment of members;
- Create incentives for members to chair and participate in task forces;
- Establish clear guidelines of content and format;
- Coordinate with other committee chairs to design effective and wide-reaching dissemination programs.

Initiative 10: Enforcing the Code and promoting transparency. If survey and opinion research is to continue to flourish, individual surveys must be seen as meeting high quality standards by other practitioners and as credible by decision makers and the general public. Throughout its history AAPOR has positioned its Code as the standard for the practice of survey and opinion research for members and non-members alike. On occasion, the association has

sanctioned individuals and organizations whose disregard for the principles embodied in the Code has, in AAPOR's judgment, imperiled the overall credibility of the profession. This vigilance should continue.

AAPOR also has come to recognize that a more positive and proactive approach to protecting the credibility of survey and opinion research may be a more effective strategy than the reactive step of sanctions. And so a Transparency Initiative has been proposed and the outlines of a program of certification, archiving, and auditing is now on the way to implementation. This Transparency Initiative should continue as a component of our Strategic Plan. While other aspects of AAPOR governance are being evaluated, the organization of the Transparency Initiative and its operations also needs to be examined. The current intention is that the initiative should be considered one of the regular, continuing functions of AAPOR.

Conclusion

The implementation of these initiatives will require sustained effort by Council members and by the committees appointed by Council. The initiatives are meant to be priority activities. They constitute the chief agenda for Council work. The AAPOR budget must be developed with these priorities in mind. Council positions responsible for each initiative need to incorporate the work and needed resources in their annual plans. Candidates for Council office should be well versed in this Strategic Plan so that they can effectively lead initiatives if elected. Progress on the initiatives should be measured annually so that the plan can be modified.

Like any organization, AAPOR must adapt in the face of changing conditions. The ten initiatives outlined here provide the association with a blueprint to guide its activities over the next three to five years. We envision a more efficient and effective organization that better serves its members, provides enhanced educational opportunities, and gives more effective guidance to practitioners on the key issues confronting our field.