

Terms of Reference

General National Survey of CES Membership

1. BACKGROUND

As a virtual not-for-profit organization, with over 1,700 members and 11 regional chapters the CES seeks a survey firm to design, implement, and report findings of an inaugural general survey of membership.

A Membership Survey is a vital tool for collecting information on an organization's value proposition. It provides important data for planning and management according to membership perspectives, priorities, concerns, needs, desires and expectations.

The service mandate of the Canadian Evaluation Society is one of the main priorities of the [CES Strategic Plan 2015-2018](#) to "Engage, grow and diversify our membership" by:

- i. engaging members and Chapters in the value proposition conversation
- ii. increasing retention of our existing members
- iii. attracting new members
- iv. increasing diversity of membership profile to better reflect the range of the evaluation profession

What differentiates a membership survey from other CES surveys which have focussed on distinct program topics (eg. training, professionalization) or were geared to specific Chapters, is the general focus on how well CES is serving its diverse members and what they want from their professional association.

2. PURPOSE

The purpose of a general survey of CES membership is to inform and validate plans, priorities and decisions about resource allocation of the CES Board of Directors and standing Committees, as well as the work of the CES Secretariat, Executive Director and Chapters. It will offer trend data over time and a basis for comparison with Chapter-specific analyses, especially as a biennial or triennial exercise. It will also provide a foundation for a new Membership Strategy to guide CES' relationships with current, past and future members and evaluation stakeholders (which will address recruitment and retention, among others).

The design and implementation of CES' national general membership survey will include the following dimensions¹:

- a) Capitalize on the **mobilizing effect of surveys to engage and inform**² members;

¹ Based on a short review of the literature on best practices in membership-based surveys and membership management (available on request).

- b) **Understand professional affiliation** -- professional attachment and motivations for joining a community of practice (or not), reasons for staying, or come-and-go; time and other commitments; exploring what they like in other professional associations that they adhere to; (note: reasons for leaving will be explored separately)
- c) **Explore utility** – confirming CES’ value proposition, relevance of services, programs, information, or relationships offered by or through CES;
- d) **Address satisfaction** – verifying quality of program and service delivery, systems and procedures; nature, frequency and experience of using services; sense of inclusion or recognition; effectiveness of communication.
- e) **Apply findings to operations** and ensure **feedback loops to participants**.

Of course while also keeping the survey experience short, fun and interactive!

3. SCOPE OF WORK

The contractor will design and implement a national bilingual online survey of CES’ membership³. Utmost importance will be put on respecting confidentiality and adhering to the CES Privacy Policy.

Key tasks will include:

- a) Review of select past surveys of CES, Chapters, and other comparable societies (all provided);
- b) Produce a detailed workplan and methodology, with ethics protocols and timelines -- reflecting strategic dimensions outlined in Section 2 above ;
- c) Develop a draft online survey design and questionnaire; lining up survey questions against the information needs; the questionnaire should not require more than 15-20 minutes to complete;
- d) Bilingual pre-test of the online survey;
- e) Implement the online survey including sending an initial invitation by e-mail as well as up to three reminders;
- f) Status reports on completion and initial results;
- g) Compile and present preliminary findings for comment;
- h) Prepare a final summary report of findings *20-slide powerpoint with topline results, limited to tables;

² This refers to the potential positive sentiment of affiliation, and new knowledge or awareness of CES products or services by virtue of being asked a question; NOT to be designed or misconstrued as a “push poll” https://en.wikipedia.org/wiki/Push_poll

³ Including all current members plus recently lapsed (within 3-months)

- i) Transfer data (denominalized micro data and aggregate data) in Excel format, with data dictionary and all analytics to the CES. The final translated questionnaire will be provided in a format which can be copied (word) for future use by CES Chapters or Committees.

CES will provide the following: background documents; translation of materials and communications; coordination of emails to membership requesting participation.

4. PROJECT MANAGEMENT & ADMINISTRATION

The survey project will be managed by the CES Executive Director. The Executive Director will coordinate input from a Survey Working Group, and seek approvals of workplan and key deliverables by the Communications & Marketing Committee (C&M) of the national Board of Directors.

The Executive Director will be the primary liaison with the contractor and will be responsible for ensuring that deliverables and work schedule are on track, and approving payments as confirmed by C&M. The CES Survey Working Group will provide comments and guidance on drafts. CES Board Members will be invited to comment on drafts at key milestones.

The contractor is expected to develop the questionnaire, manage the data and report on findings expediently; however a detailed analysis with narrative interpreting results is not required as it will be undertaken by the CES Survey Working Group.

5. QUALIFICATIONS & EXPERIENCE SOUGHT

The consultant will meet the following profile:

- Conversant in English and French at a level commensurate with the scientific requirements of the assignment;
- 5 years specialization in online survey design, administration and analysis. Able to draw from experience with similar surveys, to provide the CES with recommendations to address membership issues
- understanding of the membership-based context of a not-for-profit professional society;
- Software requirements?
- Excellent communication, data presentation, and teamwork skills.

6. TIMING

This is anticipated as a 3-month project:

Month 1:

- Inception; review of materials; workplanning & methodology; draft design; approvals
- Revise draft design; approvals (translation); pre-test; revise; approve (translate); launch

Month 2:

- Status reports; monitor participation rates and recommend messaging;
- present preliminary findings

Month 3:

- Finalize data analysis; prepare report (ppt summary of key findings);
- transfer data securely.

7. BUDGET ESTIMATE

The estimated budget for developing and implementing one round of this membership survey is a total of \$10,000 plus taxes.