

To: NAFE Board

From: Committee on the Participation of Women
Beth Gunderson, Chair
Jennifer Polhemus
Mary Barros-Bailey
Rick Gaskins

Re: Addendum to Report Presented at July 2003 Board Meeting

Date: November 21, 2003

I. INTRODUCTION

At the July 2003 Board meeting, the Committee on the Participation of Women in NAFE presented its initial report. Chiefly, the report was comprised of quantitative data based on archival materials. The committee has since completed its collection of qualitative data. In this Addendum, we present the results of the telephone interviews we conducted and offer an analysis of the information, as well as recommendations for the Board. We begin with a description of the research methods we employed.

II. RESEARCH METHODS

Archival Data

Our data collection involved two separate strands. Initially, we reviewed and analyzed archival materials (back issues of NAFE journals, newsletters, and annual membership lists) to compile data on female membership and participation as journal authors, reviewers, and editorial board members, and as conference organizers, presenters, panelists, and discussants. Also, we used archival NAFE-L postings to identify female members who have been active on the list-serve. The results of this strand were presented at the July Board meeting.

Interviews

Our second research strand attempted to investigate the perspectives and experiences of female FEs, other than just the four women who were original members of the POW Committee. It was determined that a telephone survey of female FEs would provide a valid and valuable source of information, and that such a survey would be a manageable task for the committee. A committee member trained in qualitative research methods guided the interview process.

We began with the list of female NAFE members (the most current from March 2003), and divided it into three sub-groups: active, non-participating and non-renewals. "Active" members were defined as those that had organized, authored, reviewed, presented, or discussed a paper for a NAFE conference or journal; or participated actively in the NAFE-L; or served on a NAFE committee; all during the period 1987-2002. "Non-

renewals” were those women who had not renewed for 2003.¹ All other female members were designated as “non-participating.”

We also sought to identify female FEs who were active in the profession but who were not NAFE members. A message was posted on the NAFE-L asking for names of such women, and POW Committee members were able to offer suggestions as well. Four non-members were identified by respondents from the listserv and 9 were identified from journal contributions.

We decided to focus our analysis on the non-participating group. We interviewed 18 of the 54 non-participating NAFE female members. We also interviewed 4 active members, 2 non-renewals, and 2 FEs who are not NAFE members.

We used a sample selected to reflect both the geographical diversity and the disciplinary diversity (i.e., economics, accounting, and vocational professionals) present in NAFE, as well as the different organizational forms in which FEs conduct their work (i.e., full-time sole practitioner, part-time FE also working as a professor, and member of a consulting or accounting firm). The interview questions were designed to reflect both theories and measures of participation and some of our initial hypotheses about the determinants of active participation. A copy of the protocol is attached. Note that although the interview process was structured, there was an opportunity for each interviewee to ask questions and offer suggestions at the conclusion of the interview.

Authenticity

We used five techniques to improve the authenticity of the interviewee responses: 1) we used only female committee members to conduct the interviews; 2) we paired interviewers with interviewees outside their own geographic markets; 3) we did not pair interviewers and interviewees that were already personally acquainted²; 4) we used voice and/or email to provide an introductory signal, prior to actually calling the subject and conducting the interview; and 5) interviewees were informed that their responses would be combined with the responses of others on an anonymous basis.³ Interviews typically lasted 15-30 minutes. Interviewers took notes during the telephone sessions, and then entered brief summaries of the responses onto a table for analysis. In some cases, additional detail or interesting quotations were also recorded.

Limitations

The limitations of our quantitative and qualitative data collection are as follows. With regard to the participation of women as journal reviewers – the most frequent form of journal participation – we were able to measure only the fact that a member served as a reviewer. Data on the frequency or intensity (i.e., the number and depth of papers

¹ These same members had not renewed their membership since 2001.

² Since all the POW Committee members have been active in NAFE, including the NAFE-L, some interviewees were generally familiar with the name and possibly the background of the interviewer.

³ This means that although the POW Committee members know the identity of the interviewees and who conducted each interview, the responses were compiled, reported, and analyzed without the interviewee's name attached.

reviewed) were not available. With regard to conference participation, we only looked at formal measures of participation (e.g., presenters); we had no information concerning the degree to which women do or do not participate in audience questions or discussions, nor their attendance at a conference. With regard to the telephone interviews, we acknowledge that our sample was not selected using rigorous data selection techniques. Thus, the information collected through the interviews should not be used as an indication of the responses of all female NAFE members. Our purpose in conducting the interviews was to broaden and deepen our understanding, and to attempt to capture perspectives and new ideas from outside the committee, rather than to make predictions about the responses of other women members. We acknowledge that some of the questions we asked in the interviews, and merely the fact that we made unsolicited, friendly personal contact with other female NAFE members, may increase the future participation of some of the interviewees. We expect this to be a secondary, and beneficial, effect of the committee's work.

III. SUMMARY STATISTICS FROM TELEPHONE INTERVIEWS

The following tables present the summary information as collected from the interviews:

Discipline/Background

Economic Consultant	6
Vocational Rehabilitation Consultant	1
CPA	9
Consultant/Analyst	<u>2</u>
Total	18

Academics

Previously	2
Yes	5 (3 Adjuncts)
No	<u>11</u>
Total	18

Years in Practice

Less than 5 years	2
5 years up to 10 years	3
10 years up to 15 years	5
15 up to 20 years	3
20 years or more	<u>5</u>
Total	18

Form of Practice
 Solo Practice 8
 With Group 10

FE as Percentage of Work
 Less than 25% 1
 25% up to 50% 4
 50% up to 75% 3
 75% to 100% 10

Reason Why Joined NAFE
 Journals 7
 Professionalism 8
 Conferences 1
 Listserv 1

Reason Why Continued Membership
 Journals 12
 Professionalism 7
 Conferences 3
 Listserv 2

Ever Attended a NAFE Conference?
 Yes 5
 No 13

Comments About NAFE Conferences
 Bad timing (e.g., academic schedule conflicts with family)
 Distance
 Too busy
 New member
 Irrelevant content/too academic
 No CLE/CEU credit
 People not friendly
 Too expensive (WEAI)
 Likes the discussions

Attended Conferences

<u>No</u>	<u>Yes</u>
2	1
2	
4	
1	
2	
2	
	1
	1
	1

Published?
 NAFE journal 1
 Other journal 5
 No 12

Aware of NAFE-L?

Yes	7
No	11

Networks with Members?

Yes	5
No	13

Concurrent Memberships

NACVA	4
AICPA	8
NABE	1
AREA	4
American Counseling Association	1
National Career Development Ass.	1
AEA	3
WEA	1
SEA	1
CSC	1
ACA	2
IARP	1
ASSA	1
AAEFE	1
CSWEP	1
ACFE	1
CFE	1
ACVA	1
ASOA	2
Other	4

Children at Home?

Yes	7
No	11

<u>Suggestions to Make NAFE More Useful</u>	<u>Attended Conference</u>	
	<u>No</u>	<u>Yes</u>
Sessions: more practical	3	1
Journal articles: more applied	1	
Generally: more friendly/open to outsiders	1	1
Just having conversations with someone is helpful	1	
Address issues of employability	1	
CEUs	1	
Harder to develop the traditional networks for women	1	
'Mom' factor	1	
WEAL too expensive, although tempted by program		1
Let women know when there will be other women attending		1

IV. DISCUSSION AND RECOMMENDATIONS

As our original report demonstrated, the number of women members in NAFE has been growing in much the same way as the membership overall. Women participate in many aspects of NAFE work. However, in some aspects their representation is very limited or non-existent.

Of particular interest are: 1) the decline in the active participation⁴ of women in NAFE-sponsored conference sessions since the mid-1990s; 2) the change in the *type* of participation by women in conferences (a shift away from author roles to discussant roles); 3) the minor presence of women as authors of published papers in NAFE journals (at a time when editors report a lack of sufficient quality submissions); and 4) the continued participation of women as journal reviewers, yet the relative absence of women from the journals' editorial boards.

With these issues in mind, we offer below some recommendations for the Board. Our recommendations in some cases may be characterized as simply "consciousness raising," while in others, they entail direct action. Although it may be obvious upon reading this report, we believe that some of the concerns and ideas expressed by the women members we interviewed are not particular to women per se. We expect that a number of our recommendations may address participation by men as well as women.

The participation of women as Board members deserves some mention. In the history of NAFE, there has been only one female Board member, Luvonia Casperson, who served for the nine-year period 1990-1998, including a period as President. Some of our interviews revealed that she was able to bring women into the organization's activities during her tenure. Further, we expect that her visibility and her board responsibility related to participation of women may have encouraged other women to

⁴ "Active" participation here is as we defined in our original report, i.e., women who had organized, authored, reviewed, presented, or discussed a paper for a NAFE conference or journal; participated actively in the NAFE-L; or served on the NAFE Board or a committee, all during the period 1987-2002.

step forward even without being asked. Recently, the Nominating Committee selected a woman (the chair of the POW Committee) for one of the three Board openings; Board elections are underway at the present time. It is expected that having a female on the Board may revive some of the informal networking efforts that Dr. Casperson led.

Personal Connections

A volunteer professional association such as NAFE thrives – that is, experiences growth in membership, attendance, and volunteerism – when its members feel they have personal connections with other members. Busy professionals have many choices available to them when allocating their time. Members are more likely to view the alternative of attending a NAFE conference (or participating in some other NAFE activity) positively when they already know some of the other attendees.

Interviewees reported an interest in and awareness of the activities of NAFE, yet many could report no personal connection with the organization (excepting the telephone interview itself). One non-participating interviewee explained her feelings about the NAFE meetings she had attended⁵: “[They seem like] a pretty tight crowd...it’s awkward to break in. This is not necessarily anyone’s fault, [but] they were not overtly friendly.” Another interviewee, who had never attended a NAFE meeting and also reported no personal connection to NAFE, explained how she imagined NAFE meeting sessions: “I picture a room full of high-level economists bantering about theory.” We suggest that if such members had personal connections with even a few individuals in NAFE, they would be more likely to participate in the organization.

Both women and men like to be welcomed and/or invited to participate. Social convention may mean that women members particularly value such an introduction. A number of women designated as “active” members in our study *became* active originally because another member took an interest in them personally.

The spread of personal connections across NAFE would seem to have numerous benefits for individuals and for NAFE. Regional meetings and electronic communication (including the NAFE-L) already facilitate such connections. But the key for growth of these connections is to ensure that the NAFE leadership *continues* to reach out to new and unknown members, acknowledging that sometimes this comes at the expense of cultivating the rewarding relationships already formed. We hesitate to use the term “mentoring” here, because it implies a longer term relationship and may include seniority dynamics⁶. What we recommend is outreach, which can take place at conferences and through opportunities for co-authorship, as well as through less formal contact.

⁵ Although the interviewee had attended NAFE meetings, she did not meet the criteria established for “active” member.

⁶ The mentoring “thread” does appear throughout our recommendations, however, such as when we suggest having current members contact new members as they join, and linking up experienced authors with new authors.

⇒ **Recommendations**

1. During conferences, NAFE leaders (including Board members and session organizers) could take the initiative to greet unknown and nonparticipating members and include them in social occasions, including group meals. One way to facilitate this would be to have a sign-in sheet available at NAFE conference sessions.
2. A list of conference registrants from among NAFE members (along with institutional affiliation and contact information) could be provided via the NAFE-L in advance, to assist in making early contact with new or unknown attendees via telephone or email. An announcement in the NAFE Newsletter and the NAFE-I could request that those planning to attend the conference notify the NAFE office via email.
3. Explore the possibility of a pilot no-host social occasion intended specifically for female conference attendees.
4. As new women members join NAFE, they could be welcomed by a brief telephone call from a current member.
5. To the extent that discretionary funding is available to an individual board member, preferably but not necessarily a female, that board member could take the responsibility of reaching out specifically to female members who are not participating in the organization. Dr. Casperson accomplished this during her tenure on the board by informally inviting a few newer female colleagues to get together during professional conferences.
6. Reinforce, publicize, and personalize the value obtained from attending a NAFE conference session and participating in the NAFE listserv. This could be accomplished through a NAFE Newsletter article containing real-life examples to illustrate the tangible benefits received by participants.

Academic Affiliation of Women NAFE Members

We noted that the majority of women we interviewed were not affiliated with any academic institution. An academic affiliation may bring with it an imperative or inclination to conduct research and publish, and/or to provide service (e.g., committee membership) within the discipline. It may also present the potential for reimbursement of costs related to conference attendance. These incentives may influence an academic FE to participate actively in NAFE, where a non-academic FE would not have the same incentives. At the very least, academic affiliation is a characteristic that will be of interest to the Board when assessing the needs and interests of NAFE members.

To investigate how strongly non-academics (e.g., CPAs and full-time FEs) are represented within the female membership, we used information in the NAFE membership directory⁷. Of the 76 current women members that we had identified in our original report (see the Appendix), we were able to determine academic affiliation for 53, 70% of the female membership. We found that at least 40 members, or 75% of those women whose academic affiliation we could identify, were presently non-academics.

⁷ The most recent directory containing information regarding academic affiliation is the 2001 issue, published in hard-copy form.

Therefore, interviewees' suggestions appearing to be most directly pertinent to non-academic FEs are, by extension, pertinent to *women* members, since they are primarily non-academics. For this reason, we include them in our recommendations⁸.

The comments of one woman interviewee, a successful CPA with an exclusively FE practice for many years, brought out numerous interesting and somewhat paradoxical perspectives. She finds NAFE very valuable and stated that "I wouldn't give up my NAFE membership for anything....The CD [of journal articles] is the 'coolest thing' ...the greatest thing since sliced bread." Yet, when asked about why she had never submitted a paper, she said, "I would be completely intimidated to even try." A regular attendant at national conferences for CPAs with litigation practices, she has never attended a NAFE conference, because she feels they are too theoretical. She said, "This is great that there are people out there who do this [think about theory], but I'm more interested in the practical aspects....The case budgets do not allow for that type of analysis and the jury couldn't understand it anyway...[The conferences] are at a level higher than I need to be." Interestingly, this interviewee lacked any personal connection with NAFE or NAFE members.

⇒ **Recommendations**

7. Offer more papers and sessions at conferences on applied and practice-related topics.
8. Seek out journal articles on applied and practice-related topics.
9. Seek out new presenters and authors from among non-academic FEs.
10. Include a "Research We Would Like to See" section in the NAFE Newsletter, to prompt potential authors (non-academics as well as academics).

Identification of Interested Women and Creation of New Opportunities for Involvement

The current NAFE Board has made noticeable gains in the inclusion of women in positions of responsibility, particularly in appointments to committees, and it is to be commended. At the same time, we are aware of the need for increased submissions to both NAFE journals, as well as the oft-repeated plea from conference organizers for authors and panelists at the various regional meetings. Also, concerns have been raised recently over the need for younger members to become more involved in NAFE. This all points to a need to broaden the involvement of members, including women.

Since NAFE lacks local chapters or a formal feeder structure, NAFE leaders may naturally turn to their own acquaintances when seeking "new blood" to fill positions of responsibility. The NAFE Board would benefit from having specific and accessible information about the availability of women (and men) for such tasks, through use of a voluntary "talent bank." Also, given the fact that women have – in general – more family responsibilities than men, women may be interested in participating when less intensive

⁸ More than one interviewee asked that CE credit be offered by NAFE. Although the topic of CE is beyond the scope of this committee, we do note that the demand for CE places a higher opportunity cost on attending conference sessions for those needing CE credits, e.g. CPAs. To the extent that women members are in need of CE credits, this may explain their conference participation rates.

forms of member involvement are available; this idea parallels the phenomenon of “job sharing” popular among women workers in some companies.

⇒ **Recommendations**

11. A message could be posted to the NAFE-L, as well as included in the newsletter and the journals, that the Board seeks to broaden the participation of the membership in the activities of NAFE. Members would be encouraged to submit information to a talent bank, highlighting such information as special research interests or experience and availability to act as a reviewer, particularly in connection with those special research interests.
12. The availability of talent bank data could enable journal editors and editorial boards to seek out new reviewers and better match manuscripts with reviewers.
13. The talent bank form might ask for possible interest in reviewing 1 – 3 papers in the coming year. The proposition here is that volunteers may be more ready to step forward, particularly into a new environment or task, when they have a way to limit their involvement from the outset.
14. Journal editors could consider bringing together potential authors with other FEs with similar or complementary interests and expertise, for collaboration on papers. This “matchmaking” may be particularly appealing to members who are not academics, members who have heretofore not been involved in NAFE, and members with limited time, i.e., women members.
15. The availability of talent bank data could enable journal editors to broaden editorial boards to include women, by informing the editors of the skill sets available.
16. A brochure could be created that would identify all of the benefits of a NAFE membership. This could be provided to new members and made available to prospective members at meetings.

Note Regarding Household Services and Women

Women frequently have far-reaching family responsibilities that hinder their participation in discretionary professional activities. One of our initial hypotheses was that the presence of children at home would influence women’s participation decisions. However, we note that the majority of the non-participating women we interviewed did not have children at home. Therefore, we were unable to confirm that hypothesis.

While the share of domestic responsibilities borne by women is not a phenomenon that should (or could) be addressed by the Board, we thought it might be helpful to present some interviewee responses on this issue. One interviewee offered her reason for not attending more conferences: “[I am already] overwhelmed trying to manage my life *and* my husband’s” (emphasis added). Another interviewee explained that the conference sessions must be truly superb, in order for her to justify disrupting the lives of at least four other people (her spouse, her children, and her childcare provider) so that she may attend.

Dissemination

We hope that the Board will authorize this committee to submit an article, summarizing our research and findings, for publication in the NAFE Newsletter and posting on the NAFE-L. The article could include information about how to obtain a copy of our full report for those members interested in more detailed information.

V. ACKNOWLEDGEMENTS

We are grateful to Nancy Eldridge for her fine institutional memory and her willingness to assist us in searching for archival data. Also, we acknowledge the support of Southwestern University for the provision of graduate student research services in connection with compiling the names of female authors of JFE, LED, and LER papers.

SUMMARY OF RECOMMENDATIONS

Personal Connections

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6. Reinforce, publicize, and personalize the value obtained from attending a NAFE conference session and participating in the NAFE listserv. This could be accomplished through a NAFE Newsletter article containing real-life examples to illustrate the tangible benefits received by participants.

Women Tend to be Non-Academics

7. Offer more papers and sessions at conferences on applied and practice-related topics.
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9. Seek out new presenters and authors from among non-academic FEs.
10. Include a "Research We Would Like to See" section in the NAFE Newsletter, to prompt potential authors (non-academics as well as academics).

Identification of New Talent and Creation of New Opportunities for Involvement

11. A message could be posted to the NAFE-L, as well as included in the newsletter and the journals, that the Board seeks to broaden the participation of the membership in the activities of NAFE. Members would be encouraged to submit information to a talent bank, highlighting such information as special research interests or experience and availability to act as a reviewer, particularly in connection with those special research interests.
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NAFE POW

Telephone Interview Protocol

Female FEs – Current NAFE Members

Pre-interview:

Leave an introductory message using the voice mail of the interviewee, generally by calling at night or on the weekend. This gives the interviewee some advance notice of your call and advances rapport. Suggested text:

“My name is _____. I am an economist in _____, and I’m a member of the National Association for Forensic Economics. I sit on a special NAFE committee looking at the participation of women in the organization. I understand that you are a NAFE member, and I hope that you can take a few minutes to talk with me over the telephone in the next few days. I will send you an email with my contact information, and I’ll call you back on _____. Thank you in advance and I’ll look forward to talking with you.

Interview:

Do you have a few minutes to talk to me now? This is an informal interview, but I do have a list of questions I’d like to work from. I am taking notes, but what you say in our conversation will be combined with the responses of others, so it will not be attached to your name. I hope you can be candid, so that the work of our committee will have more value to NAFE. Do you have any questions about the interview, before we begin?

1. How would you describe yourself, in terms of your position or job title?
2. About when did you start performing damages analyses in connection with litigation?
3. Do you work on your own, or for an organization? (this may be obvious)
4. Is forensic economics your primary work? What other types of work do you do? Can you estimate how much of your professional time, in percentage terms, is spent in forensic work?
5. How did you get involved in forensic economics originally?

6. Have you worked in academia? (currently or in the past)
7. Do you remember the reason or reasons that you joined NAFE originally?
8. What would you say is the reason or reasons that you continue your membership in NAFE? (Probes: journals, professional status, conferences)
9. Have you ever attended a NAFE conference or conference session?
 - A. If yes -- What were the reasons that you attended?
 - B. If no -- Can you identify any reasons why you have not chosen to attend? (Probes: location, time away from work, cost, obtains information through colleagues, doesn't know anyone who attends, family responsibilities)
10. Have you ever submitted a paper to a professional or academic conference or journal, whether to NAFE or some other organization?
 - A. If yes -- Which associations and journals?
11. Are you familiar with the NAFE list serve? Are you a subscriber?
 - A. If yes -- Can you characterize your use of and satisfaction with the list-serve? (Probes: frequency, Can you remember a specific project in the past year, where you used information on the list-serve to assist in your analysis?)
 - B. If no -- Have you ever been a NAFE-L subscriber? Do you use other email networks in your work?
12. Through your membership in NAFE, have you formed any networks or professional relationships – email, phone, or in-person – with other NAFE members?
13. What other professional associations do you belong to? Are there any of those for which you have been an officer or served on a committee?

14. Do you have children living at home? (this may already be obvious)
15. The special committee that is conducting this study, and interviewing female practitioners, is interested in learning more about what NAFE might do to encourage more participation by women. Is there anything that you can tell us, from your perspective, that would make the organization more useful to you in your work?
16. Are there any other comments or questions that you have about this? Thank you very much for your time.