

**Society of American Archivists
Council Meeting
November 9 – 12, 2014
Chicago, Illinois**

**Task Force on Membership Affinity Groups:
Final Report with Recommendations
(Prepared by Task Force Members Rachael Dreyer, Rebecca Goldman,
Shawn San Roman (Chair), Francine Snyder, and Jordon Steele)**

BACKGROUND

The Task Force on Member Affinity Groups (TF-MAG), created by the SAA Council in August 2013, is charged to consider the most effective affinity group structures which encourage flexible, inclusive, and participatory opportunities for the membership of the Society of American Archivists. This should include an evaluation of the effectiveness of current affinity groups (sections and roundtables) and consider whether restructuring affinity groups might better serve members. The group is also charged with identifying what kinds of support and resources are needed to allow current and proposed potential affinity groups to work most effectively.

In meetings with 2013-2014 SAA President Danna Bell, she charged the Task Force with the freedom to “be creative” and think critically, broadly, and not be afraid to challenge the existing affinity structure. At the same time, she encouraged the Task Force not to recommend changes for the sake of making changes, and not to “reinvent the wheel.” The goal was to examine the structure critically to see what items could use some tweaking and/or where significant changes could or should be made. The ultimate goal was to create a report of actionable items for the Council to consider and ultimately implement.

The Task Force on Member Affinity Groups conducted a thorough analysis of the mission and activities of each section and roundtable and surveyed the membership to gain insight into its perspective on affinity groups and how they might be improved. We believe the following recommendations preserve the spirit of focused, effective collaboration that underlies the purpose of affinity groups while enabling SAA to prioritize resource allocation in more equitable manner. Recommendations are grouped into three sections:

- **Section 1. Recommended Changes to SAA Affinity Group Structure**
- **Section 2. Recommendations to Strengthen Leadership Experience for Affinity Group Leaders**
- **Section 3. Recommendations to Help Affinity Groups Meet Member Needs**

We understand that the Council is not resourced to implement all of our recommendations even if it agrees with all of them; however, we provide this list and invite the Council to proceed with as many as seem appropriate.

Information-gathering Methodology

The Task Force on Member Affinity Groups employed a variety of approaches to inform our analysis. We compiled a comprehensive list of sections and roundtables and mapped one or more functions and collection types to each affinity group. SAA provided us with a list of all affinity groups sorted by number of members, which helped us rank groups by popularity. We drew upon past analyses, including findings from a joint survey led by the Metadata and Digital Object Roundtable and the Electronic Records Section in 2013. A survey generated by this Task Force was also distributed to SAA members through the SAA-supported listservs. From these sources, we analyzed comments and needs from the respondents that included affinity group leaders and SAA members. Finally, we reviewed salient SAA records to gain greater insight into the historical context for the current affinity group structure and leadership recommendations.

DISCUSSION AND RECOMMENDATIONS

SECTION 1: Recommended Changes to SAA Affinity Group Structure

Overview

Currently, affinity groups are classified as sections or roundtables. Historically these distinctions defined SAA's allocation of budgets and technology, but this is no longer the case. The survey showed that a majority of members did not understand the differences between these two classifications, nor did the classifications correlate with the activity level of the group, membership numbers, or its popularity.

We also conducted a functional analysis of affinity groups. Historically, sections represented major archival functions, created by SAA leadership, while roundtables reflected grass-roots responses to evolutions in the field that would lead to smaller, more informal gatherings at the Annual Meeting. However, our analysis revealed two conditions that challenge this conceptual distinction between sections and roundtables. First, some major archival functions are represented as roundtables—for example, records management. Second, some roundtables can be more active, more popular, and more organized from year-to-year than their section counterparts. A good example of this quality is the Metadata and Digital Object Roundtable, whose membership and attendance at Annual Meetings often surpasses many section groups, and whose programming at Annual Meetings often represents formal, content-driven events addressing major archival issues. In the contemporary SAA, the conceptual difference between sections and roundtables is often unclear, yet sections still yield benefits not extended to roundtables, many of which are just as active and popular (if not more) than many sections.

Areas to Strengthen

Recommendation 1.1.

Discontinue the arrangement of affinity groups by sections and roundtables and instead adopt a group model loosely organized by function, collection type, or audience type.¹

Recommendation 1.2.

Groups will not be required to meet in-person at the Annual Meeting. Prior to each Annual Meeting, SAA will ask groups if they would like meeting space. Group leaders that wish to meet will be required to submit a request for meeting space that briefly describes the purpose of their meeting. In the event that more groups ask for meeting space than is available, SAA will select which groups meet based on the number of “active” Full Members in groups.²

Recommendation 1.3.

With the new group structure, it is recommended that new membership levels, Full and Associate, be created to allow SAA and the Council to objectively evaluate active affinity group membership without limiting the number of groups a member can join. SAA members would be able to join four groups as Full members and an unlimited number of groups as Associate members. This will Full and Associate membership is defined as follows:

- Full members: Access to all resources (listserv, meetings, website), hold office, count towards SAA group membership evaluation.
- Associate members: Access to all resources (listserv, meetings, website) however do not count in SAA group membership evaluation, nor will these members hold office. Includes individuals without SAA membership. Recommendations also include the option for members that want to hold office to have the ability to transfer to Full membership through an automated online membership feature.

SECTION 2. Recommendations to Strengthen Leadership Experience for Affinity Group Leaders

Overview

Comments in the member survey conducted by the Task Force suggested that members see the leadership within a section or roundtable as the primary factor in whether or not a section or roundtable is viewed positively. Through analyzing the comments, we determined that leadership

¹ See Appendix 1: Related Affinity Groups: A Guide for Affinity Group Leaders.

² *Staff Note:* Currently sections and roundtables are not required to meet at the Annual Meeting. A process for requesting meeting space exists and is implemented each year. In the event that more meeting space than what is available is requested, evaluation criteria exist for evaluating which groups receive priority. The criteria take into account the group’s history in meeting deadlines, level of activity, collaborative efforts, and meeting attendance so as not to disenfranchise smaller but effective groups. See Governance Manual, Section X., Roundtables, D.2.b., at <http://www2.archivists.org/governance/handbook/section10>.

could benefit from improved communication, training, and collaboration, which, in turn, would strengthen affinity group activities.

Areas to Strengthen

1. Dissemination of Basic Information to Leaders

While leaders claim to have a good idea of their duties, there is general confusion on overall leadership structures of affinity groups, their missions, and what the Council's role is in providing direction to affinity group leaders. Respondents made several comments relating to this confusion, as seen in this particular comment: "Our section seems to be very confused about why the section exists and what it should be doing...It would be helpful for SAA Council to address what it expects from affinity groups..." This indicates that not all of the Council's recent communication efforts are reaching intended audiences, nor are SAA members clear on the Council's role in guiding affinity groups.

Recommendation 2.1.

Building on current SAA and Council communication initiatives, strengthen existing leadership definitions, communications, and dissemination methods. Recommendation includes making the SAA Leadership Resources page more findable online by placing it directly under "Groups" rather than its current location "About Us | Policies and Procedures;" distributing the Leadership Resources URL via email regularly to all new leaders, along with the current distribution of resources at the Leadership Forum; and updating "Guide for SAA Leaders" to include "Know Your Section's Mission" and where to find it and expanding "Working with SAA Council" to include a definition of the Council's responsibilities as affinity group liaisons so leaders clearly understand what to and not to expect.

2. Leadership Training

Leaders asked for better leadership training from SAA. Currently, SAA offers the Leadership Forum for affinity group leaders. However, only 10.17% (18) of respondents found the Leadership Forum "Helpful," while 57.62% (102) of respondents either found the Leadership Forum "Not helpful," "Did not use," or "Did not know it existed." Similarly, general comments regarding leadership expressed a need for a "leadership forum" or "leadership orientation" in order to provide leadership training, cooperation, and guidance about SAA policies and procedures. This illustrated that the Leadership Forum is not reaching its target audience. Likewise, at the 2014 Annual Meeting member forum session, members indicated that they thought the Leadership Forum was limited to experienced leaders. Therefore, new leaders, who would benefit most from the Forum, were not attending. Attendees also expressed interest in using the Leadership Forum to hear from component group leaders and learn from the successes and challenges of other groups.

Recommendation 2.2.1.

Expand visibility and accessibility of Leadership Forum. Clearly communicate that new professionals and steering committee members are encouraged and invited to attend. Encourage current and past affinity group leaders to present at the Forum.

Recommendation 2.2.2.

Increase ways to “attend” the Leadership Forum by expanding attendance to include participation via webinar or other online options to include all possible leaders, not just those that can attend the Annual Meeting. Leadership Forum can be streamed or broken into smaller pre-recorded webinars. The webinars would be free for leaders and available for an affordable registration to non-leaders.

Recommendation 2.2.3.

Create small task force or committee to evaluate and expand (as necessary) Leadership Forum Curriculum. This group’s work could include: analysis and dissemination of successful techniques and practices in active affinity groups, interviews with various levels of members to determine leadership “roadblocks” or perceived barriers that could be overcome through training, and development of new training modules to expand leadership needs.

3. Leadership Collaborations

Leaders asked for more opportunities for informal or ad hoc meetings with other leaders on like-minded topics, unstructured time for meetings, virtual (only) meetings, and facilitated opportunities for collaboration with other affinity groups. This need was reiterated during member forum session at the 2014 Annual Meeting.

Recommendation 2.3.1.

In an effort to increase cost-effective ways for affinity group leaders to network and collaborate with other affinity group leaders, create an informal collaboration (such as a coffee hour) during SAA’s Annual Meeting (not before as many attendees cannot come early) to allow leaders to network, discuss ideas for collaboration, and share successful ideas that invigorate groups. Have a Council member or past leader attend this meeting as a facilitator to spark and guide discussion.

Recommendation 2.3.2.

Have a Council member or a “successful” past leader hold “office hours” during breaks in SAA sessions and meetings for quick consultations with group leaders.³

³ *Staff Note:* Current and incoming SAA presidents have held office hours at the past few Annual Meetings. In 2013, Council members also began holding office hours. All office hours have taken place in the Exhibit Hall and have been announced via the official conference schedule, the Onsite Program, and meeting signage.

Recommendation 2.3.3.

Promote the leaders listserv or establish a new online forum to candidly discuss issues and get quick answers to procedural questions throughout the year.⁴

Recommendation 2.3.4.

Incentivize collaborative meetings or programs at SAA by rewarding such inter-group collaborations with priority meeting space and times, longer meetings, and technology support.

SECTION 3. Recommendations to Help Affinity Groups Meet Member Needs

Overview

The member survey and discussions with the Council highlighted several areas in which affinity groups could help meet member needs.

Areas to Strengthen

1. Improved Methods to Create and Disband Groups

Members find current methods to create or disband groups confusing or unclear. Using non-biased methods, the recommended processes will allow for synergy between groups, provide ways for inactive groups to refocus, and reward innovative groups.

Recommendation 3.1.1.

With the new proposed structure in Recommendation 1.1., members wanting to create a new group will follow existing procedures for establishing a roundtable. New groups approved by the Council will be given a listserv, webspace, and access to the tool for holding online elections, but they will not be guaranteed meeting space at SAA or any additional SAA support. In an effort to keep the SAA affinity group structure focused and streamlined, the Council should require members seeking to form new groups to demonstrate why their mission and goals do not match existing groups with similar areas of concern.⁵

Recommendation 3.1.2.

Groups that fail to meet the standards for three consecutive years will be automatically disbanded by the Council. Disbanded groups will have the option to ask to merge with existing active affinity group or become a virtual-only group.⁶

⁴ *Staff Note:* In November 2013 the Leader List was converted from an announcement list to a discussion list.

⁵ *Staff Note:* The Governance Manual, Section X., Roundtables, C.1., states the following: The Council may establish roundtables upon submission of a group's application. The Council will consider the merits of each request in light of existing SAA groups and the specific statement of intent and goals of the applicant group.

⁶ See Recommendation 3.2.1.

Minimum standards include: maintaining a minimum number of members evaluated annually, fulfillment of guidelines as defined by SAA, evidence of annual activity as communicated in the group's annual report and/or member surveys (including listserv traffic or posts, evidence of working groups and/or initiatives, communications, and meetings).⁷

2. Improved Communication Among Members

Members have expressed a need to communicate better between groups internally and externally.

Recommendation 3.2.1.

Establish virtual-only groups for ad hoc or limited need topics. Groups would have listserv and website resources without Annual Meetings. Groups would naturally expire if there was no activity on listserv or website for two to three years. Basic requirements include a rotating moderator/social media coordinator and adherence to SAA policies for professional conduct.

Recommendation 3.2.2.

Develop recommendations and/or resource guides with how-to suggestions for affinity groups on how to engage their members using social media, using data from the survey conducted by the Task Force and from the Communications Task Force report as a starting point. Encourage sections and roundtables with active presences on social media to share strategies and advice.

⁷ See Appendix 2: Participation Matrix. While not exhaustive, these are currently the items many groups are already utilizing. These metrics can and should be updated as technology changes and groups innovate.

Appendix 1: Related Affinity Groups: A Guide for Affinity Group Leaders

TF-MAG analyzed the missions of the groups in order to compile a list of groups that have similar charges. We hope that this list will facilitate collaboration between related groups to convene joint meetings as appropriate at upcoming annual meetings.

Electronic records management:

- Electronic Records Section
- Metadata and Digital Object Roundtable
- Records Management Roundtable
- Web Archiving Roundtable
- Preservation Section

Description:

- Description Section
- EAD/EAC-CPF Roundtable
- Visual Materials Cataloging and Description Roundtable
- Visual Materials Section

Visual materials:

- Visual Materials Cataloging and Description Roundtable
- Visual Materials Section

Advocacy:

- International Archival Affairs Roundtable
- Human Rights Roundtable
- Issues and Advocacy Roundtable

Other Considerations

The Research Libraries Roundtable's mission is complementary to a variety of other affinity groups depending on their Annual Meeting programming. Therefore, we encourage this affinity group to seek out opportunities to partner with other groups for meeting time at the Annual Meeting.

Virtually all of the collections-focused groups could potentially have overlap with one or more of the function-focused groups, depending on Annual Meeting programming. These groups are encouraged to partner with the function-focused groups when appropriate.

**Appendix 2:
Participation Matrix**

		# of Members	# of “Associate Members”		
Membership					
		Y/N	# of posts/ updates per Week	# of posts/ updates per Month	# of Attendees
Meetings					
	SAA Annual Meeting				
	Non-annual meeting (in-person)				
	Video/ Telephone (List)				
	Other (List)				
SAA Website					
Non-SAA Website					
SAA Listserv					
Newsletter					
News Update (Digest)					
Social Media					
	Facebook				
	Twitter				
	LinkedIn				
	Google+				
	Instagram				
	Other (List)				
Group Leadership					

Meetings					
	SAA Annual Meeting				
	Non-SAA Annual Meeting (in-person) (List)				
	Email & Listserv				
	Telephone				
	Video (List)				
	Other (List)				
Presentations					
	SAA Annual Meeting				
	Non-annual meeting (in-person) (List)				
Open-ended Questions					
	Initiatives				
	Working/ Issue Groups				