

**Society of American Archivists  
Council Meeting  
August 22, 2011  
Chicago, Illinois**

**Staff Report: Draft RFP, Member Needs and Satisfaction Survey  
(Prepared by Brian Doyle)**

During the past year, the Membership and Diversity Committees have discussed the desire to conduct a joint survey. In addition, as detailed in the Membership Committee's January 2011 Council discussion item on institutional membership,<sup>1</sup> the committee proposes that a survey of institutional members is needed to determine how best to meet the needs of this constituency. Finally, a variety of "e-business" initiatives (e.g., e-publications, webinars, virtual conferencing) continue to be discussed as the Society looks forward to adapting its programs and services to emerging demands.

The FY12 budget approved by the Council in May 2011 includes an \$8,000 line item in the Membership program planner to conduct a survey. The draft request for proposal outlines in broad strokes the project goals and timeline for this effort.

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<sup>1</sup> <http://www.archivists.org/council/Council0111/0111-IV-D-InstMemb.pdf>



**SOCIETY OF  
American  
Archivists**

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REQUEST FOR PROPOSAL:

# Member Needs & Satisfaction Survey

**September 2011**

## Contact

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SOCIETY OF AMERICAN ARCHIVISTS

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## Introduction

Founded in 1936, the Society of American Archivists is North America's oldest and largest national archival professional association. SAA's mission is to serve the education and information needs of nearly 6,000 individual and institutional members and to provide leadership to ensure the identification, preservation, and use of records of historical value.

## Project Goals

1. Conduct project needs and priorities assessment.
2. Design and execute a general, periodic member needs-and-satisfaction survey to collect data over time that may be used to:
  - a. Analyze member demographics and identify segments accordingly:
    - i. Individual member demographics to include such variables as:
      - 1) Gender
      - 2) Race and ethnicity
      - 3) Salary
      - 4) Career level
      - 5) Industry sector (e.g., government, academic, corporate, etc.)
    - ii. Institutional member demographics to include such variables as:
      - 1) Industry sector (e.g., government, academic, corporate, etc.)
      - 2) Institutional size
        - a. Number of employees
        - b. Number of archivists employed
      - 3) Annual budget
  - b. Assess performance of and/or member satisfaction with core program areas;
  - c. Assess overall member satisfaction with SAA; and
  - d. Identify emerging member needs and priorities.
3. Design a supplemental, one-time survey instrument to query respondents regarding prospective “e-business” priorities, including e-publishing, e-learning, and virtual conferencing.

## Vendor Responsibilities

1. Submit itemized RFP for member needs and satisfaction survey.
2. Assist SAA staff in designing survey instrument(s) and subject-selection methodologies. Our database supports segmentation and export of member records by:
  - a. Member type (e.g., Full Individual, Associate, Student, Institutional)
  - b. Individual affiliation with member institutions
3. Administer survey instruments and collect data.
4. Perform statistical analyses.
5. Deliver final report(s), including raw data in spreadsheet format.

## Proposed Project Timeline

<b>September 30, 2011</b>	RFP Deadline
<b>October 14, 2011</b>	Proposal Evaluation and Selection
<b>October 21, 2011</b>	Execute contract
<b>October 24, 2011</b>	Project kick-off
<b>November 18, 2011</b>	Complete project needs and priorities assessment
<b>December 2, 2011</b>	Complete development of survey instruments – alpha version
<b>December 16, 2011</b>	Staff review and complete revisions to survey instruments – beta version
<b>January 2012</b>	Launch survey(s)
<b>February 2012</b>	Close survey(s)
<b>March 2012</b>	Analyze results and deliver final report

## Proposal Requirements

### General Information

1. Company Name
2. Contact Name and Title
3. Address
4. Phone
5. Email
6. Website

### Management Profile

Please provide a brief history of your company and/or principal executives. Include a description of the company's range of services, specialties, and management philosophy, especially as they relate to professional membership societies. Please include profiles of key project personnel.

### Methodology

1. Outline the methodology that will be used to design, administer, and analyze the survey.
2. Describe your project management approach. With whom and how will we communicate to complete the project milestones as outlined in the proposed project timeline?
3. Describe the project timeline. Please explain any variations to the proposal above.
4. What technology tools do you provide to administer the survey?  
Please provide a demonstration for review purposes.
5. What tools and methods do you use to analyze survey data?  
Please provide a sample final report.

### Budget

Please provide an itemized budget and description of your pricing model. In addition, please identify any project areas where cost-saving measures are a possibility. For example, can SAA-hosted technology tools be used to effectively administer the survey instrument?

## References

Please include at least three references with contact names, phone numbers, and emails from organizations that have contracted with your company on similar projects.

## Submissions

Submit proposals electronically by September 30, 2011, to:

Brian Doyle

SAA Director of Member & Technical Services

[bdoyle@archivists.org](mailto:bdoyle@archivists.org)

## Equal Opportunity/Non-Discrimination Policy

The Society of American Archivists is a professional organization established to serve the educational and informational needs of its members. SAA promotes cooperation, research, standards, public awareness, and relations with allied professions and thereby advances the identification, preservation, and use of records of enduring value. Because discrimination and unequal treatment are inimical to the Society's goals, SAA hereby declares that discrimination on the grounds of age, color, creed, disability, family relationship, gender identity/expression, individual life style, marital status, national origin, race, religion, sex, sexual orientation, or veteran status is prohibited within the Society. SAA will vigorously pursue a policy of non-discrimination and equal opportunity through its programs, activities, services, operations, employment, and business contracts.