

**SAA Membership Development Task Force
Strategic Planning Agenda
March 17-19, 2006**

For travel directions to Club Quarters, Central Loop, please see below.

Friday, March 17

- 6:30 pm “Get Acquainted” Dinner
Wishbone (<http://www.wishbonechicago.com>)
1001 W. Washington Blvd.
Directions from hotel to restaurant: <http://tinyurl.com/p5s9l>
- Review and modify agenda as deemed necessary.

Saturday, March 18

SAA Headquarters
527 S Wells Street, 5th Floor

Directions from hotel to SAA office: <http://tinyurl.com/mrj5f>

- 8:30 am Continental breakfast
- 9:00 am Review 2004 Membership Development Task Force Report
1. Review accomplishments
 2. Identify what still needs to be done
 3. Establish what uncompleted accomplishments can we drop
 4. Determine if our assumptions about SAA’s membership needs, with a focus on targeted audiences and their needs, are still true. Consider most recent data on membership growth trends as well as strategic priorities recently identified by SAA Council (see below).

Nancy: Very good news in member data trends; Past action plans not yet executed; Collateral materials not created; Brack fund not tapped; But, good news!; Due in large part to Key Contacts, pubs, workshops (including ad hoc discounts for student members)

General discussion regarding implications of data trends:

- Increase in national salaries/inflation? –When was last time that salary levels for ID classes established/reviewed?
- Does decrease in lower ID levels reflect lack of conversion of student members?

Data/reporting needs

- Geographic distribution of members
- Years in the field for each contact

- Age of each contact
- Type of institution
- Full-time and part-time
- Racial/ethnic data
- Relate data on lapsing to:
 - years in the profession
 - years in SAA
 - age
 - race/ethnicity
 - service in SAA
 - dues category
 - workshop attendee
 - conference attendee
 - publications customers
 - section membership
 - institutional affiliation (esp. NARA > special “NARA” Key Contact)
- Beaumont: Data overload on membership form?
 - Rather than trying to collect everything at initial point of contact, establish point of contact 6 months out to collect additional info
 - Different info collected on renewal forms vs. new application
 - Online membership profile
 - Phone/customer service procedure to verify contact info

Review of FY06 Membership budget, explanation of how program planners work

Doyle: Discussion of FY07 proposed activities

Discussion of target audiences:

- Conversion of student members = Retention of 1-3 year members? (mostly true)
- Discussion of bridge rate, career starter rates
 - Meg: Need to gather data on who is using bridge rate
 - Different reasons why student might choose to drop
 - ♣ Increased cost, same benefits (Beaumont: Need to focus on benefits, too)
 - ♣ Archives not their primary field
 - Tap student chapters for information
 - ♣ How many students obtain jobs?
 - ♣ Help maintain contact with students who have moved

Membership ID card; Meg: “I love the idea of a membership card because I can never remember my number.”

Key Messages:

Meg on NARA:

- Benefits typically touted by SAA don’t resonate with NARA employees;
- Culture at NARA also needs to change; Weinstein working to change this;

- Potential message: Membership in SAA provides opportunity for face time/networking with senior employees at NARA (i.e., above the members' pay scale) who can be of benefit to junior employees in their career goals.
- Meg: What distinguishes NARA employees who join SAA from those who don't? Those who were trained in library schools more "indoctrinated" to notion of archival profession vs. those trained as historians.
- Presidential libraries: Employees don't join/don't think of themselves as archivists.

"The membership committee graciously relinquishes responsibility for the raffle."

9:45 am Order lunch

10:00 am Review most recent data and projections for membership growth

10:30 am Review strategic issues, especially Diversity Issue Statement

Kathi: Review of strategic planning background

Target audiences:

- Government agencies
- Religious archives, esp. those of certain congregations (e.g, Baptists)
- Members of associations of black historians, etc.

Key message:

- Ensure preservation of your community's archival records;
- Discounts on specific workshops and publications pertinent to target audience
- Networking via AAC, Tribal Archivists, etc.
- Info Expo at Joint Annual Meeting

Action Items:

- Target government agencies/NARA for member recruitment
- Staff an SAA membership table at the Info Expo in DC

11:30 am Review available results of the A*CENSUS Survey

1. Identify new target audiences that we should consider for membership development?
2. Identify the potential needs of these "new" audiences?

12:00 noon Lunch

12:30 pm Identify/discuss strategic issues pertaining to membership development

1. Retention of student members

2. Diversity
3. Institutional contexts (e.g., government archives vs. academia) and their impact on membership
4. Others?

2:00 pm Discuss upcoming database conversion/migration and implications

2:30 pm Discuss other membership related issues:

1. Dues increase currently being considered by Council task force;
2. Question of the difference between SAA sections and SAA roundtables, also being considered by Council task force with possibility of restructuring

3:00 pm Discuss Membership Committee procedures and responsibilities

What should the committee be focused on? What current activities, if any, can/should be reconsidered?

Key Contact Program:

Meg: Very valuable and important program.

Gerri: Just as Brian said that conference attendees should meet at least one person at meeting, Key Contact program ensures that members have direct peer-to-peer contact with fellow members.

Gerri: Membership development activity in and of itself.

Key Contact administration:

Quarterly basis, key contact receive list of new and lapsed members, contact them, and reissue reports to district reps.

Action items:

- Break out data by state, Canadian, other internationals
- Eliminate subscriptions
- Include contact individuals for institutional members
- New member list to contain only true new members, not rejoins
- Send period “hot issues” samples of staff letters and buckslips to KC Coordinator
- Brian to send welcome email to new key contacts

4:00 pm Capture and record (on white board) ideas for 3-year “Action Plan”

5:00 pm Adjourn

Dinner on your own.

Sunday, March 19

Breakfast on your own.

- 9:00 am Map out 3-year “Action Plan” that includes a cycle of strategies for membership development
1. Identify assumptions for a 3-year action plan
 2. Identify and prioritize target audiences and needs
 3. Identify actions needed to meet the needs of target audiences
 4. Identify “costs” associated with particular actions
 5. Prioritize action steps and establish times for completion
 6. Assign responsibilities for action steps and reporting mechanism.
- 11:30 pm Other business?
Question: Membership Development TF to meet annually or biennially?

Meg:

- Prefer meetings that have more focused agenda.

Brian:

- Propose conference call “status checks” in Oct/Nov 2006 and Apr/May 2007
- Reconvene in Chicago 2007

Nancy:

- Joint group meeting for Membership/Diversity?

12:00 pm Adjourn

Travel Directions to Club Quarters, Central Loop

111 West Adams Street

(Next to the Rookery and near LaSalle)

See map: <http://tinyurl.com/gju3k>

Phone: (312) 214-6400

From O'Hare Airport

By car: Take I90/94 Southeast to Downtown Chicago and exit at Monroe Street. Turn left, east, onto Monroe Street and travel 10 blocks to Clark Street. Turn right, onto Clark Street traveling south one block to Adams Street. Turn right, west onto Adams and Club Quarters will be on your left-hand side. Look for a blue awning with the CQ logo in gold.

By train: Take the CTA Blue Line (<http://www.transitchicago.com>) to the Monroe stop in the Loop. Adams is one block south of Monroe. Take Adams 1-1/2 blocks west. Club Quarters will be on your left-hand side. Look for a blue awning with the CQ logo in gold.

From Midway Airport

By car: Take Cicero Ave, North to I 55. Take I55, Northeast to I94. Take I94 North to Downtown Chicago and exit at Monroe Street. Turn right, east, onto Monroe Street and take it 10 blocks to Clark Street. Turn right, south onto Clark Street and take it one block to Adams Street. Turn right, west onto Adams and Club Quarters will be on your left-hand side.

By train: Take the CTA Orange Line (<http://www.transitchicago.com>) to Quincy in the Loop. The train station is on Wells St. Walk north to Adams. Take Adams 1-1/2 blocks east. Club Quarters will be on your right-hand side. Look for a blue awning with the CQ logo in gold.