

Society of American Archivists Report to Council

Membership Development Task Force September 2004

The Membership Development Task Force met at SAA Headquarters September 18-19, 2004, to develop a strategic action plan for 2005-2007 that will ensure coordination of membership development efforts among the Membership Committee, the Key Contacts, other volunteers, and staff. In attendance were Membership Committee Chair Scott Schwartz, Committee members Gerrienne Schaad and Meg Phillips, Council Liaison Kathryn Neal, and Staff Liaison Nancy Beaumont. The Task Force addressed the following agenda:

- I. Review 2003-2004 Action Plan
 - A. Review the year's accomplishments
 - B. Identify what still needs to be done
 - C. Establish which incomplete tasks we can drop
 - D. Determine if assumptions about SAA's membership needs, with a focus on targeted audiences and their needs, were confirmed by results of action plan

- II. What Can We Learn from Early Results of A*CENSUS?
 - A. Identify what new target audiences we should consider for development
 - B. Identify potential needs of these "new" audiences
 - C. Do survey results affect key message(s) to key audience(s)?

- III. Map Out 3-Year "Action Plan" That Includes a Cycle of Strategies for Membership Development
 - A. Identify assumptions for 3-year action plan
 - B. Identify and prioritize target audiences and needs
 - C. Identify actions needed to meet needs of high-priority audiences
 - D. Identify "costs" associated with particular actions
 - E. Prioritize action steps and establish times for completion
 - F. Assign responsibilities for action steps and reporting mechanism

Following a thorough review of the status of items in the 2004 Membership Development Action Plan and a brief review of early results from the A*CENSUS survey that are specific to SAA, the Task Force members developed a plan for 2005-2007 that includes detailed actions and research requirements in Year 1; the addition of one or more target audiences in Year 2 based on the outcome of Year 1 actions and research, as well as additional research to inform Year 3 actions; and a target goal for total membership in Year 3 that is optimistic and achievable.

Task Force members also reviewed the Membership Development budget for FY2005 and discussed the limitations of SAA's current association management software system. They noted that the current AMS system is not sufficiently robust to track vital membership demographics that are essential for the effective planning and management of SAA's membership development efforts, and they urged Neal and Beaumont to pass along to Council their strong support for consideration of moving to a more efficient and effective system that would aid in membership development efforts.

The Task Force on Membership Development proposes the following optimistic but achievable three-year goal: Increase total SAA membership to 5,000 members by June 30, 2007. This goal is based on the perceived benefit that would accrue to the profession and to SAA if the Society were to represent a "majority" of the universe of archivists. As of the closing of the A*CENSUS survey in June 2004, that universe totaled 11,937 individuals. While 5,000 does not represent the "majority" of this universe, it is a strong move toward that goal. As of August 31, 2004, SAA membership stands at 3,968.

RECOMMENDATION:

That the SAA Council adopt the Membership Development Action Plan for 2005-2007 as proposed by the Membership Development Task Force of the Membership Committee.

Support Statement: The proposed plan provides a simple framework for monitoring the Society's membership development efforts in the coming year by identifying key audiences and messages, defining tasks, assigning responsibilities, and setting deadlines. In addition, it lays out in general terms the actions and research needs for 2006 and 2007 that should be considered as the plan is executed and results are evaluated.

SAA MEMBERSHIP DEVELOPMENT ACTION PLAN (2005-2007) **(To be Revised in June 2005, June 2006, June 2007)**

Year 1 (July 1, 2004 – June 30, 2005)

Action: The group agreed that the three highest-priority target audiences in FY2005 should remain the same as in FY2004: 1) retention of those who have been members of SAA for one to three years, as statistics indicate that these members are at particular risk for lapsing; 2) recruitment and retention of the “core” (ie, library/archives) student group; and 3) recruitment back into membership of those who have lapsed within the past two years, and particularly those who have indicated that they “would like to continue membership but could not at the time their membership lapsed.” It is important to note that the primary focus of any membership development activity should be *retention*—a reduction in the level of “churning” that occurs when members drop in and out—because it costs more to recruit a new member than to retain an existing one.

Action plans for each of these audiences, including key messages, tasks, deadlines, and assignment of responsibility, are included in the Attachment.

Research: The A*CENSUS survey results provide a rich source of data about the profession, and specifically about SAA members (and nonmembers). The Task Force proposes that research in 2005 rely heavily on an analysis of A*CENSUS data and focus on two potentially critical audiences:

- The “mid-career” archivist (defined as one who has been in the profession for 8-12 years; is “beyond the basics”; has learned his/her job; has taken several or many existing continuing education offerings; is interested in planning, development, and management of archives; and sees the potential for one or more job changes before retirement); and
- The nonmember archivist. A significant number of non-SAA member participants in the survey agreed to allow the “census-taker” to contact them. These are “hot” prospects for membership.

Task Force members Schaad and Phillips, working with Beaumont and A*CENSUS Principal Research Consultant Vicki Walch, will undertake the task of analyzing the survey results from a membership development perspective. Key tasks for Year 1:

- Analyze the A*CENSUS data to determine the characteristics of mid-career archivists.
- Analyze the A*CENSUS data to determine the needs of mid-career archivists.
- Analyze the A*CENSUS data available from non-SAA members to determine the characteristics of those respondents and to “tease out” how they may differ from SAA members.

In addition, to ensure that the student audience is well-served, the Task Force recommends that the following ideas be researched:

- Investigate development of a mechanism to advise students on job-search strategies (in order to substitute for misuse of the Mentoring Program). Schwartz, Jennifer Snyder, and one other member of the committee will conduct this investigation.
- Consult with Council regarding the feasibility of providing funding to ensure that each student chapter is visited each year.

Year 2 (July 1, 2005 – June 30, 2006)

Action: The Action Plan for Year 2 will include careful monitoring and evaluation of existing activities and development of new activities based on what we learn. In addition, new activities may be proposed based on what we learn about mid-career archivists and nonmembers in Year 1 research. Specifics of the plan will be developed in June 2005 for Council review in August 2005.

Research: Because it is likely that more information will be needed to ensure a full understanding of the “mid-career archivist” audience, the Task Force proposes that SAA conduct more targeted qualitative research (via sampling) based on the survey data to confirm the needs of these individuals.

In addition, the Task Force would propose that we mine the A*CENSUS data to determine the characteristics and needs of members in the 50- to 60-year-old group, with an eye to engaging this group in mentoring activities that would significantly benefit other member groups.

Year 3 (July 1, 2006 – June 30, 2007)

The goal for membership development by June 30, 2007, is to increase SAA membership to 5,000, moving toward representing a “majority” of the universe of archivists. As this plan completes its cycle in Year 3, we propose to:

- Monitor and evaluate the activities directed to each existing target audience,
- Determine whether key target audiences should be redefined based on our experience and research results (e.g., identify high-risk groups),
- Revise key messages as appropriate, and
- Refresh the ongoing Membership Development Action Plan.

Key Audience #1: One- to Three-Year Members

Key Messages:

- SAA provides affordable access to best practice information (via Web seminars, discounts on publications, discounts on workshops; Annual Meeting is an efficient way to gain your continuing education, more affordable than a college course; RT/section meetings, session recordings available).
- SAA provides means to nurture your career development (mentoring, Career Center, networking, units in which you can develop contacts and presentation and leadership skills).

What?	By When?	Who?
Include letter with invoice to Year 1, Year 2, Year 3 members:		
<ul style="list-style-type: none"> • Year 1: Welcome. We're glad you're part of SAA; how are we doing; let us know if there's anything we can do to make your experience better; are we meeting your needs. • Year 2: Are you aware of: Mentoring Program, Career Center, benefits of Annual Meeting (Navigator Program), how to get involved? • Year 3: Involvement: Key Contact? Committee? Presenter? Mentor/coach a student? Units? (Mini-survey to determine volunteer interests?) 	Ongoing 12/15 draft; 1/05 send 2/15 draft; 3/05 send	Phillips: draft Beaumont: edit Spears: implement mailing
Include New Member events/interests call-out in Annual Meeting Preliminary Program.	4/05	Beaumont
Follow-up correspondence to New Member attendees of Annual Meeting to solicit feedback on meeting.	10/04	Beaumont
Communicate with unit leaders the importance of developing services/responsiveness to 1- to 3-year members. [Tools (eg, newsletter material) and talking points for leaders.]	2/05	Neal Beaumont
Articles in <i>Archival Outlook</i> :		
<ul style="list-style-type: none"> • Mar/Apr: Annual Meeting Experience: Career Center, Mentoring, Poster Sessions, Networking • Sep/Oct: Annual Meeting wrapup [completed]. • Nov/Dec: End-of-Year Donations 	2/05 8/04 10/04	Schaad/ Phillips Schwartz Schwartz

General e-mail messages to all members in this group:		
<ul style="list-style-type: none"> SAA Prez Comments at 2004 Closing Plenary and/or What's New on the Web Site (from SAA President) 	10/04	Jimerson Beaumont
Brochure/bill stuffer in 1- to 3-year member invoices		
<ul style="list-style-type: none"> Direct, elegant, punchy, use slogan (Advocacy, Information, Education, Community) 	Spring 2005	Beaumont [MDTF review]

Key Audience #2: Students in Library/Archives Programs (Approx 150 each year)

Key Messages:

- At just \$40, membership in SAA is a good value, a good investment in your career: SAA provides means to nurture your career (mentoring, Career Center, networking, units in which you can develop contacts and presentation and leadership skills, scholarships).
- SAA provides opportunity to see what jobs are out there, exposure to broader spectrum and larger network, stepping stone to other opportunities. Access to people with broader, more diverse backgrounds.
- SAA advocates for archivists and archival issues.
- Get involved: It's good for you, it's good for your career, it's good for the profession. (There is strength in numbers within SAA.)

What?	By When?	Who?
Contact 5 of the lead professors in the 12-15 library/archives programs (via phone) to 1) note that SAA has focused on developing new benefits and opps for involvement of students; 2) materials that we can provide you to help make your students aware of SAA and its role in advocating archives. [Use Education Directory list.]	1/15/05	Schwartz
Send blast e-mail messages to all student members to emphasize benefits per key messages.	4/05 9/05	Beaumont
Send welcome e-mail message to individual students as they join the Student Listserve.	Ongoing	Beaumont

Monitor Student Listserve and respond to issues (ie, provide facts, clarification) as they arise.	Ongoing	Schaad
Finalize Mentoring Guidelines and distribute via Web.	11/04	Schaad Staff
Develop house ad(s) for Career Center and Mentoring Program for inclusion in <i>AO</i> employment section.	4/05	Beaumont [MDTF]
Continue to provide call-out on student-related Annual Meeting events (eg, Career Center, Mentoring Program) in Preliminary Program.	Ongoing	Beaumont [MDTF]
Enlist Treasurer's support in fostering messages via Council visits to student chapters. [Talking points.]	Ongoing	Neal, Treasurer [Beaumont]
Communicate messages at New Member Breakfast; Vice President, Council members, Membership Committee, Key Contacts, Beaumont to attend; Council and Beaumont to participate in receiving line. [Talking points.]	8/05	All— SAA VP leads [Beaumont]

**Key Audience #3: Lapsed Members
(ie, those indicating “Want to continue but can’t”)**

Key Messages:

- There is strength in numbers. SAA advocates for archivists and archival issues.
- SAA provides connections for staying up to date, affordable access to best practice information.
- SAA provides opportunity to see what jobs are out there, exposure to broader spectrum and larger network, stepping stone to other opportunities. Access to people with broader, more diverse backgrounds.
- Are you aware of the Bridge Rate?
- We care about you and your future.
- SAA works to raise the profile of archivists/archives to ensure the long-term viability of your career choice.

- Involvement will make you more employable.

What?	By When?	Who?
For those who check on non-renewing form “I would like to continue but can’t” or “cannot renew this year,” send letter re: messages and Bridge Rate within 1 week of receipt of survey; tickler for contact at 1 year. Develop tracking mechanism to determine whether people rejoin.	Ongoing; tracking mechanism by 11/04	Spears Beaumont
For those who check on non-renewing form that they had “bad SAA experience,” staff to contact by phone.	Ongoing	Beaumont
Letter to lapses within X radius (based on population density) of Annual Meeting site, touting benefits of rejoining and attending meeting.	4/05 and ongoing	Beaumont
Letter to targeted lapses (TBD: First year? Second year? Other characteristic?) re: trying us again. [Ideas from Diane Kaplan. Tease out retirees and others who will not rejoin.]	Tease out by 11/04 to determine capability	Beaumont
Review and resend talking points and/or model correspondence for Key Contacts’ use.	10/04	Schaad