

# Society of American Archivists DRAFT Report to Council

## Membership Development Task Force Meeting March 17-19, 2006 Chicago, Illinois

The Membership Development Task Force met at SAA Headquarters March 17-19, 2006, to review and revise, as necessary, the three-year strategic action plan developed by the task force in 2004. The objective of this plan is to ensure the coordination of membership development efforts among the Membership Committee, Key Contacts, other volunteers, and staff. In attendance were

- Gerrienne Schaad, *Membership Committee Chair*
- Meg Phillips, *Membership Committee Vice Chair/Chair Elect*
- Diane Kaplan, *Nominee for Membership Committee Vice Chair/Chair-Elect*
- Kathryn Neal, *Council Liaison*
- Nancy Beaumont, *SAA Executive Director*
- Brian Doyle, *SAA Director of Member & Technical Services*
- Jeanette Spears, *SAA Member Services Coordinator*

An outline of the meeting agenda is provided in Appendix B.

### **Review of 2004-2006 Membership Development Action Plan**

The 2004-2006 Membership Development Action Plan identified a number of key audiences and outlined detailed actions and research requirements over three years. It also established a goal of increasing total SAA membership to 5,000 by June 30, 2007.

Beaumont opened the meeting by reporting the good news reflected in current member data trends, which suggest that SAA will achieve its membership target of 5,000 by the end of FY2007. However, many of the activities outlined in the 2004-2006 Action Plan have not yet been executed, nor has the Brack Fund been tapped, due to a combination of staff's workload and the limits of the current AMS system.

### ***Target Audiences, Research Objectives, and Activities:***

Key audiences and objectives identified in the 2004-2006 Action Plan were:

1. Retention of *one- to three-year members*;
2. Recruitment and retention of *student members*; and
3. Recruitment of *members who have lapsed within the last 2 years*.

In anticipation of the A\*CENSUS survey results, the 2004-2006 Action Plan also identified the following research objectives:

- Determine the characteristics and needs of *mid-career archivists* (i.e., those who have been in the profession for 8-12 years).
- Determine the characteristics of *non-member archivists* and “tease out” how they may differ from SAA members.

Finally, the 2004-2006 Action Plan proposed the following activities relating to student members and mentoring:

- Provide funding to ensure that each student chapter is visited each year.
- Develop a mechanism to advise and/or assist students in job hunting, which is outside of the scope and intent of the Mentoring Program.
- Determine the characteristics and needs of members in the 50- to 60-year-old age group, with an eye to engaging this group in mentoring activities.

### **Review of Recent Membership Data Trends**

Doyle presented a spreadsheet displaying membership growth trends per dues class over the last four years. (See Appendix C.) Findings include:

- A downward trend among lower-income members, especially ID2s (\$20-29K/yr).
- A progressive upward trend among higher-income members.
- A substantial growth in student members.
- A substantial growth in institutional members, especially at the sustaining level.

The task force members raised the following questions regarding these data trends:

- Does the decrease in membership at lower categories of membership reflect
  - A failure to retain student members as full members?
  - A failure to retain one- to three-year members?
  - An increase in professional salaries commensurate with inflation?
  - An increase in personal salaries resulting from an aging membership?

Time constraints and lack of sufficient data prevented the task force from fully exploring and answering all of these questions. However, the members did concur that there is a likely correlation and/or strategic overlap between retention of one- to three-year members and conversion of student members.

The task force briefly discussed various reasons why students might choose not to renew their membership, including:

- Increased cost, same benefits
- Archives not their primary field

The group talked about the pros and cons of one or more “career starter” dues classes (i.e., an alternative to the bridge rate) that would provide a stepping stone between student dues and full member dues. Phillips commented that we need to gather data on who is currently using the bridge rate. Beaumont added that we should focus attention on the benefits side of the equation, as well. Finally, it was suggested that SAA work with student chapters to collect information for analysis and follow-up, including:

- How many students obtain jobs in the archival profession
- Contact information for students who have moved

### ***Additional Data Reporting Needs***

The task force members discussed data reporting needs, particularly as they pertain to analysis of lapsed members, identifying the following required demographic information:

- Years in the profession
- Years as an SAA member
- Involvement in SAA
  - Years as an SAA member
  - Service on committees, sections, roundtables, etc.
  - Attendance at workshops, annual meeting
  - Purchase of SAA-distributed publications
  - Section membership
- Institutional affiliation
- Type of institution
- Full-time / part-time status
- Race/ethnicity
- Age

Beaumont expressed some concern about avoiding information overload on membership application and dues renewal forms. The following remedies were proposed:

- Establish point of contact six months out to collect additional information.
- Establish a new staff customer service procedure for telephone contact to collect and verify contact information.
- Collect different information on application and renewal forms.
- Provide mechanism for member entry of additional information via website.

### **Status Report, Discussion, and New Proposed Activities**

Many activities identified in the 2004-2006 Action Plan pertained to key audiences that are defined according to length of membership. These tasks have not yet been fully executed because the requisite record selection and reporting capabilities are not available in SAA’s current database. Therefore, staff will place a high priority on resolving these obstacles in the course of implementing the new database.

Likewise, some research objectives have not been fully executed as final reports from A\*CENSUS are still pending. However, a preliminary A\*CENSUS report presented by Vicki Walch at the 2005 Annual Meeting in New Orleans shows a significant drop in the percentage of SAA members employed in the government sector compared to figures reported by Burckel in 1965.<sup>1</sup> Walch's report also suggests that government employees are the least likely to belong to a professional association serving archivists. Coincidentally, a report presented by Brenda Banks suggests that minorities are more *highly* represented in the government sector than in academia, the non-profit sector, etc.<sup>2</sup>

Whereas non-member archivists were identified in the 2004-2006 Action Plan as "hot prospects for membership," and whereas a diverse membership is a major strategic priority of SAA, the task force proposes adding *government archivists* as a fourth target audience to those referenced on page 1. Recommendations for key messages and activities are listed in Appendix A. Other groups of non-members discussed but not added to the short list include business and religious archivists.

Funding has been allocated for visits by SAA Council members to student chapters. However, scheduling of visits has been largely informal. Furthermore, staff suggested that Council's workload and the ever-growing number of student chapters compared to the relatively small number of Council members may pose obstacles to fulfilling this goal. The task force recommends expanding this activity to enlist SAA Fellows and other SAA leaders to help ensure that all student chapters receive a visit each year.

In addition, Doyle proposed sending each SAA Student Chapter an annual "care package" containing membership brochures and information on SAA goods and services of particular interest to students.

The task force also discussed ideas for enhancing mechanisms to assist students in job hunting. Schaad reiterated that job-hunting advice is outside of the scope and purpose of the Mentoring Program. As an alternative, Doyle suggested implementing an online resume bank and posting additional career advice articles and information in an expanded Career Center on the SAA website.

Task force members considered additional action strategies for membership recruitment and retention, a number of which are included on the revised action plans (Appendix A):

- Inclusion of "buckslips" in dues renewal notices featuring recent activities and accomplishments of SAA.
- Developing Key Contact communication guidelines.
- Instituting an SAA membership ID card

Regarding the last point, Phillips expressed her strong support for membership cards, noting the members frequently can't remember their membership ID number, which is required for Web site login.

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<sup>1</sup> <http://www.archivists.org/a-census/reports/Walch-ACENSUS.pdf>

<sup>2</sup> <http://www.archivists.org/a-census/reports/Banks-ACENSUS.pdf>

Administration of the Mentoring Program has been a labor intensive activity, consuming a great deal of the volunteer coordinator's time and energy. The task force discussed discontinuing the matchmaking aspect of the program. In its place, Beaumont proposed a new model—namely an online Mentoring Directory that would list prospective mentors who choose to participate. Members seeking a mentor would search the directory and would be responsible for initiating contact on their own. A set of posted guidelines would outline terms of participation for all parties. Schaad and Doyle agreed that they would work with the current Mentoring Program Coordinator, Toni Jeske, to coordinate roll-out of this new approach. Since that time, Jeske has expressed some concern that the Mentoring Program not be left to languish while a new model is developed. Further collaboration has been planned to ensure a smooth transition.

Finally, task force members discussed the administration of the Key Contact Program. Schaad and Phillips expressed their strong support for the program, emphasizing the importance of ensuring that members have direct peer-to-peer contact with colleagues. Schaad added that service in the Key Contact Program is a membership development activity in and of itself.

To enhance the effectiveness of the program, a number of action items were identified:

- Separate members by state, Canadian residents, and other internationals in Key Contact quarterly reports.
- Eliminate subscriptions from reports.
- Include primary contact (i.e., individuals) for institutional members.
- New member list to contain only true new members, not rejoins.
- Send periodic “hot issues” copy (i.e., from buckslips) to KC Coordinator.
- Doyle to send welcome email to new key contacts.

### **Next Meeting**

In discussing plans for future Membership Development Task Force meetings, Phillips commented that a more focused agenda would be helpful. Task force members agreed that the long interim between meetings presented a challenge to this. Therefore, in lieu of a face-to-face meeting, the group agreed to schedule two meetings by teleconference to conduct status checks, one in October/November 2006 and the other in April/May 2007. The task force will then reconvene in person in FY2008.

**Recommendation:** That SAA Council adopt the action plans contained in Appendix A.

## **SUMMARY OF NEWLY PROPOSED ACTIVITIES:**

- 1. Pursue strategies to increase member recruitment of government archivists.**  
Whereas NARA employees once formed the bedrock of SAA's membership, representation among government archivists in SAA has declined in recent decades. The NAGARA/CoSA/SAA Joint Annual Meeting in Washington, DC, presents a timely opportunity to engage in outreach to this non-member constituency. Coincidentally, recruitment of a racially and ethnically diverse membership is an important strategic priority. A \*CENSUS data suggests that minorities are more highly represented in the government archives sector than other sectors.
- 2. Increase funding and travel support for SAA Student Chapter visits by Council members, Fellows, and Section leaders.** With over 20 SAA Student Chapters, SAA Council has too few members and too many competing priorities to fully attend to this strategic need. The task force recommends recruiting volunteers from the larger body of distinguished SAA leaders. SAA staff will work to formalize the call for volunteers and provide the necessary administrative oversight to ensure that the majority of student chapters have an opportunity to benefit from this activity.
- 3. Send each SAA Student Chapter an annual "care package."** Student chapters are a vital conduit to one of SAA's key audiences—student members. The proposed activity seeks to institute defined points of contact and encourage participation of students in SAA programs.
- 4. Deploy an online resume bank and post additional career advice articles and information in an expanded Career Center on the SAA website.** Assistance and advice relating to job hunting is a critical need of student members. The proposed activities will enhance SAA's member benefits in this area and help relieve the Mentoring Program from requests for career advice.
- 5. Institute an SAA Membership ID Card.**
- 6. Replace the matchmaking function of the Mentoring Program with an online Mentoring Directory.** Administration of the Mentoring Program is currently very labor intensive, consuming an inordinate amount of time and energy on the part of the volunteer coordinator. The proposed model seeks to place information directly in the hands of members.
- 7. Modify Key Contact quarterly reports per page 5.**
- 8. Send periodic "hot issues" copy to Key Contact Coordinator.**
- 9. Doyle to send welcome messages to new Key Contacts.**

**Appendix A: Membership Development Action Plans by Key Audience**

**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 (career center, networking, units in which you can develop contacts and presentation and leadership skills)

<b>What?</b>	<b>By When?</b>	<b>Who?</b>
Send “welcome” email and letter to all new members	Ongoing	Spears
Send Key Contact “welcome” email	Ongoing	KCs
Send “thank you” email to all renewing members	Ongoing	Spears
Include “hot issues” buckslips with renewal invoices	4/06	Spears
Send targeted “welcome” or “thank you”/renewal letters to Year 1, Year 2, Year 3 members:		
<ul style="list-style-type: none"> <li>• 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.</li> <li>• Year 2: Are you aware of: mentoring program, career center, benefits of Annual Meeting (i.e., Navigator Program), how to get involved?</li> <li>• Year 3: Involvement: Key Contact? Committee? Presenter? Mentor/coach a student? Units? (Mini-survey to determine volunteer interests?)</li> </ul>	3/07 drafts 4/07 edit 4/07-6/07 create DB queries 7/07 send	(Done.) NPB Doyle Spears
Include New Member events/interests call-out in Annual Meeting Preliminary Program.	Ongoing	Beaumont
Follow-up correspondence to New Member attendees of Annual Meeting to solicit feedback on meeting.	10/06	Doyle/Spears

Communicate with unit leaders the importance of developing services/responsiveness to 1- to 3-year members. Media: SAA Leader Listserv, leader orientation session and materials. Tools: newsletter material, talking points for leaders, etc.	6/06	Neal Beaumont
Articles in <i>Archival Outlook</i> :		
<ul style="list-style-type: none"> <li>• May/June 06: Prospective article on special Career Center event featuring NARA recruiters (Note: Include Wilda Logan and Membership Cmte Career Center representative in planning.) Include mention/call for submission re: retrospective article.</li> <li>• Sep/Oct 06: Retrospective article on Career Center</li> <li>• Jan/Feb 07: Article on mentoring; Beaumont: focus on personal experiences rather than program.</li> </ul>	5/06  09/06 02/07	Doyle  TBD TBD
General e-mail messages to all members in this group:		
<ul style="list-style-type: none"> <li>• Presidential e-mail bulletin focusing on theme of “members welcoming new members.”</li> </ul>	9/07	Adkins Doyle/Sparks
Recast Mentoring Program		
<ul style="list-style-type: none"> <li>• Gerri to talk with Toni Jeske</li> <li>• Contact all stakeholders to notify of changes <ul style="list-style-type: none"> <li>○ Current mentors and protegés</li> <li>○ Council</li> <li>○ Membership Committee</li> <li>○ Key Contacts</li> </ul> </li> <li>• Gerri and Brian to develop public message</li> <li>• Announce to membership via website</li> </ul>		



## Key Audience #2: Students in Library/Archives Programs

### Key Messages:

- SAA is investing in your future. “SAA is your partner throughout your career.”
- Job-hunting resources (e.g., Career Center, resume bank, etc.)
- Membership in SAA is a good investment in your career: SAA provides resources that open up your professional world (e.g., networking, units in which you can develop contacts, presentation and leadership skills, scholarships).
- Membership in SAA is a way to “brand” yourself as an archivist.

What?	By When?	Who?
Send letter/email to archival educators (student chapter faculty advisors and members of the Archival Educators Roundtable) urging them to promote membership in SAA to their students. Emphasize: 1) that SAA has focused on developing new benefits/opportunities for students; 2) materials that we can provide to help make students aware of SAA and its role in advocating archives.	annually: --draft --edit/sign	Doyle SAA Prez
Send “SAA Care Packages” to student chapters. Contact faculty advisor to notify that package is being sent and confirm chapter president name and contact info	Each fall	Doyle/Spears
Obtain contact info from student chapters for all students	Twice/year	Doyle/Spears
Call for submission for AO article to student chapters		
Send blast e-mail messages to all student members to emphasize benefits per key messages, promote poster sessions, annual meeting.	4/06	Doyle/Spears
Send welcome e-mail message to individual students as they join the Student Listserv.	Ongoing	Doyle/Spears
Monitor Student Listserv and respond to issues (i.e., provide facts, clarification) as they arise.	Ongoing	Schaad
Develop online resume bank and career tips for website		
<ul style="list-style-type: none"> <li>• Draft and post tips; Brian to send reminder to Meg</li> </ul>	10/06	Phillips

<ul style="list-style-type: none"> <li>• Develop technical infrastructure for resume bank</li> <li>• Launch resume bank</li> </ul>	4/07-6/07 7/07	Doyle Doyle
Continue to provide call-out on student-related Annual Meeting events (e.g., Career Center, Mentoring Program) in Preliminary Program.	Ongoing	Beaumont [MDTF]
Facilitate visits to student chapters by Council members, SAA Fellows, Section/RT leaders [Talking points.] <ul style="list-style-type: none"> <li>• Issue call for requests to faculty advisors/student leaders; reissue call after 2 weeks</li> <li>• Issue call for volunteers; reissue call after 2 weeks</li> <li>• Volunteers to make arrangement and informally report back to SAA Headquarters</li> </ul>	Every Sept	
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.] <ul style="list-style-type: none"> <li>• Brian to send informative email to Gerri, Steve Grandin at NAGARA and Vicki Walch regarding collaborative participation</li> </ul>	8/06  by Mar. 31	All— SAA VP leads [Doyle]
NARA lunch-hour Career Center talk on recruiting and diversity, Friday August 4 <ul style="list-style-type: none"> <li>• Include Tammy Stovall, Analise Archer, Wilda Logan, Jennifer Meehan (Membership Cmte)</li> <li>• Ongoing annual activity?</li> </ul>	Contact by March 31; Arrange by April 15	Doyle
Career Center do's and don't resume board	07/06	Meehan, Kaplan
Plan "Career Coach" session for Chicago 2007	3/06-4/06	Doyle/NPB

### Key Audience #3: Lapsed Members

#### 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 4/06	Spears Doyle
For those who check on non-renewing form that they’re angry, staff to contact by phone.	Ongoing	Doyle/NPB
Letter to lapses within X radius of Annual Meeting site, touting benefits of rejoining and attending meeting.	Ongoing	Doyle
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.]	7/07	Doyle
Review and resend talking points and/or model correspondence for Key Contacts’ use.	6/06	Schaad

## **Key Audience #4: Government Archivists**

The task force members discussed membership development challenges presented by this key audience, especially as they relate to NARA employees. Phillips offered the following opinions:

- 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.

### Action Items:

- Organize a NARA Career Center talk at the Joint Meeting in Washington, DC
- Identify NARA members (via institutional affiliation search parameter) in Mentoring Directory
- Designate a NARA "point person" in SAA
- Send "thank you/glad you were here" letters to NARA employees who attend annual meeting
- Obtain and create NARA institutional hierarchy in SAA database
- Send membership promo posters to NARA offices
- Promotional offer for DC 2006 registration
- NARA Mixer

## **Appendix B: Meeting Agenda**

- I. 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).
  
- II. Review most recent data and projections for membership growth
  
- III. Review strategic issues, especially Diversity Issue Statement
  
- IV. 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?
  
- V. 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?
  
- VI. Discuss upcoming database conversion/migration and implications
  
- VII. Discuss other membership related issues:
  1. Dues increase currently being considered by Council task force;
  2. Question of the difference between SAA sections and roundtables, also being considered by Council task force with possibility of restructuring
  
- VIII. Discuss Membership Committee procedures and responsibilities
  1. What should the committee be focused on?
  2. What current activities, if any, can/should be reconsidered?
  
- IX. 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.

## Appendix C: Membership Trends from February 2002 to February 2006

<u>Dues Class</u>	<u>Dues</u>	<u>Feb '02</u>	<u>Feb '06</u>	<u>Change Over 4 Yrs.</u>	
<u>Individual</u>					
		<u>#</u>	<u>#</u>	<u>#</u>	<u>%</u>
<i>ID1</i>	\$ 70	439	443	+ 4	1%
<i>ID2</i>	\$ 90	324	218	-106	- 33%
<i>ID3</i>	\$110	577	546	- 31	- 5%
<i>ID4</i>	\$135	455	606	+151	33%
<i>ID5</i>	\$160	249	348	+ 99	40%
<i>ID6</i>	\$180	330	542	+212	64%
<i>Retired</i>	\$ 65	146	169	+ 23	16%
<i>Student</i>	\$ 40	338	811	+473	140%
<i>Bridge</i>	\$ 40	25	26	+ 1	4%
<i>Dom Assoc</i>	\$ 70	126	166	+ 40	32%
<i>For Assoc</i>	\$ 80	71	63	- 8	- 11%
<i>Life</i>	\$ 0	18	19	+ 1	6%
<u>Institutional</u>					
<i>Regular</i>	\$225	422	460	+ 38	9%
<i>Sustaining</i>	\$440	59	80	+ 21	36%
<b>TOTAL</b>		<b>3,579</b>	<b>4,497</b>	<b>+918</b>	<b>26%</b>