# Society of American Archivists
# Council Meeting
# June 8 – 10, 2012
# Chicago, Illinois

## Discussion Item: 2012 Member Needs and Satisfaction Survey
### (Prepared by Brian Doyle, Director of Member and Technical Services)

**BACKGROUND**

In October 2011, SAA contracted with Indiana-based Association Metrics to conduct a member needs and satisfaction survey. The survey was conducted between January 17, 2012, and February 6, 2012. Of 6,134 eligible participants, 2,151 members participated for a response rate of approximately 35%. As stated in the survey report, the objectives of the study were:

1. To better understand which benefits and programs members value.
2. To understand why major segments of members belong to SAA; to determine SAA's mix of loyal, neutral, and vulnerable members; to determine which member benefits are being underutilized; and to measure the performance of SAA's programs.
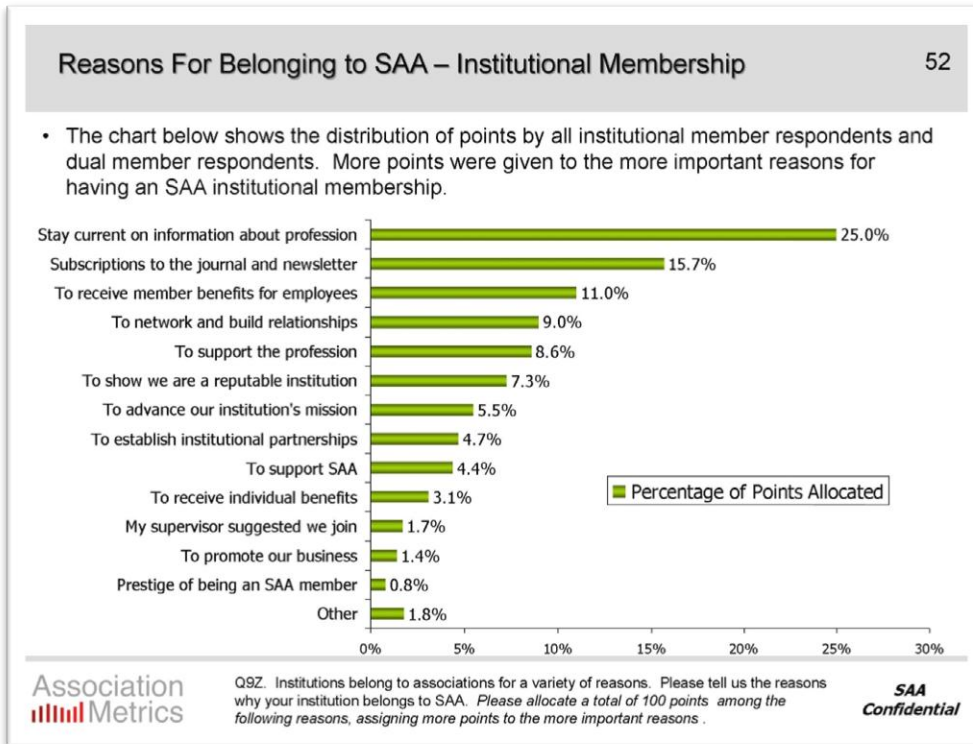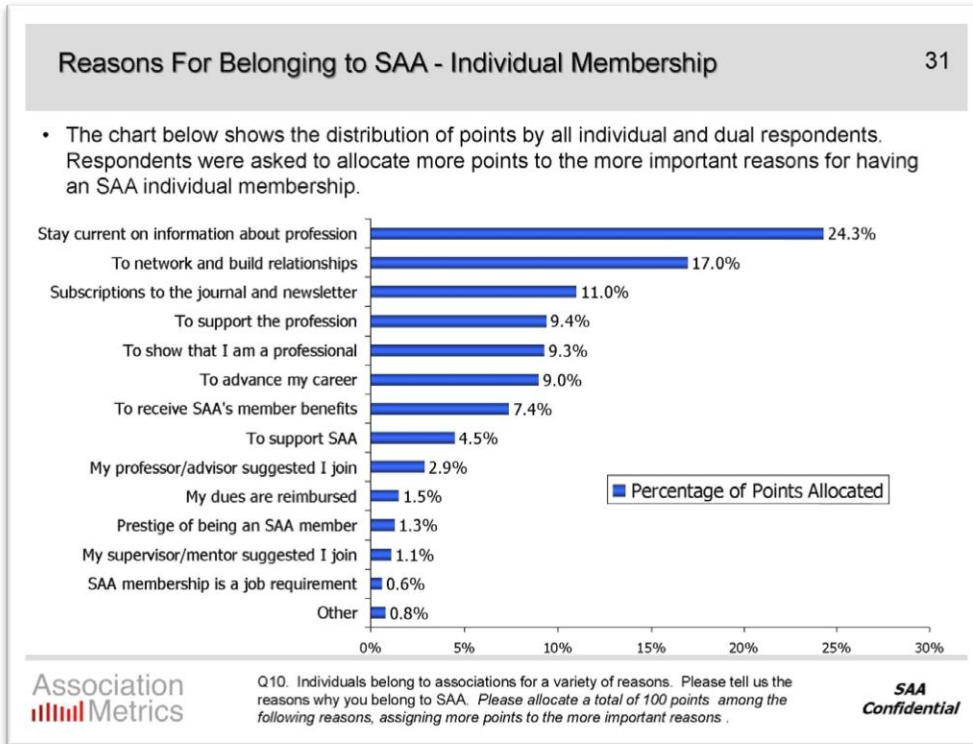3. To identify where SAA can achieve the greatest increase in retention and nondues revenue for its efforts.

**SUMMARY REPORT**

On Friday, May 18, 2012, Association Metrics presented the final survey report to the SAA Council via teleconference. The 215-page report covers a very broad range of topics:

- Key Takeaways
- Methodology
- Demographics of Respondents
- Needs Assessment – Individual
- Needs Assessment – Institutional
- Member Loyalty Assessment
- Captive Members
- Components of Loyalty
- Membership Value Analysis
- Member Benefits Analysis
- Membership Dues Analysis
- Continuing Education
- Publications
- *The American Archivist*
- *Archival Outlook*
- Website
- SAA Staff
- SAA Council
- Strategic Initiatives
- Annual Meeting
- Problem Analysis
- Conclusions / Recommendations

Given the volume of information contained in the report, SAA's survey consultant focused attention during the conference call on project methodology, benchmark findings, and how to read and/or interpret the survey results. These main points are summarized below.

Slides 31 and 52 depict the reasons that members belong to SAA. Analysis of differences between member segments (Slide 33) suggests that associate members place relatively more value on receiving information and publications than do full individual members. Student members place relatively more value on career advancement.



Reasons For Belonging to SAA - Individual Membership — 31

- The chart below shows the distribution of points by all individual and dual respondents. Respondents were asked to allocate more points to the more important reasons for having an SAA individual membership.

| Reason | Percentage of Points Allocated |
|---|---|
| Stay current on information about profession | 24.3% |
| To network and build relationships | 17.0% |
| Subscriptions to the journal and newsletter | 11.0% |
| To support the profession | 9.4% |
| To show that I am a professional | 9.3% |
| To advance my career | 9.0% |
| To receive SAA's member benefits | 7.4% |
| To support SAA | 4.5% |
| My professor/advisor suggested I join | 2.9% |
| My dues are reimbursed | 1.5% |
| Prestige of being an SAA member | 1.3% |
| My supervisor/mentor suggested I join | 1.1% |
| SAA membership is a job requirement | 0.6% |
| Other | 0.8% |

Q10. Individuals belong to associations for a variety of reasons. Please tell us the reasons why you belong to SAA. *Please allocate a total of 100 points among the following reasons, assigning more points to the more important reasons* .

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Reasons For Belonging to SAA – Institutional Membership — 52

- The chart below shows the distribution of points by all institutional member respondents and dual member respondents. More points were given to the more important reasons for having an SAA institutional membership.

| Reason | Percentage of Points Allocated |
|---|---|
| Stay current on information about profession | 25.0% |
| Subscriptions to the journal and newsletter | 15.7% |
| To receive member benefits for employees | 11.0% |
| To network and build relationships | 9.0% |
| To support the profession | 8.6% |
| To show we are a reputable institution | 7.3% |
| To advance our institution's mission | 5.5% |
| To establish institutional partnerships | 4.7% |
| To support SAA | 4.4% |
| To receive individual benefits | 3.1% |
| My supervisor suggested we join | 1.7% |
| To promote our business | 1.4% |
| Prestige of being an SAA member | 0.8% |
| Other | 1.8% |

Q9Z. Institutions belong to associations for a variety of reasons. Please tell us the reasons why your institution belongs to SAA. *Please allocate a total of 100 points among the following reasons, assigning more points to the more important reasons* .

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Slide 76 displays the overall "loyalty profile" of SAA members, which many organizations use as a baseline over time to assess performance. Within the section on loyalty, additional analysis suggests that the following types of members are likely to be more loyal to SAA:

- Members who have participated in continuing education programs;
- Older, retired, and long-time members;
- First-year members; and
- Members whose dues are reimbursed.

The consultant pointed out that these findings do not imply cause and effect—only correlation.
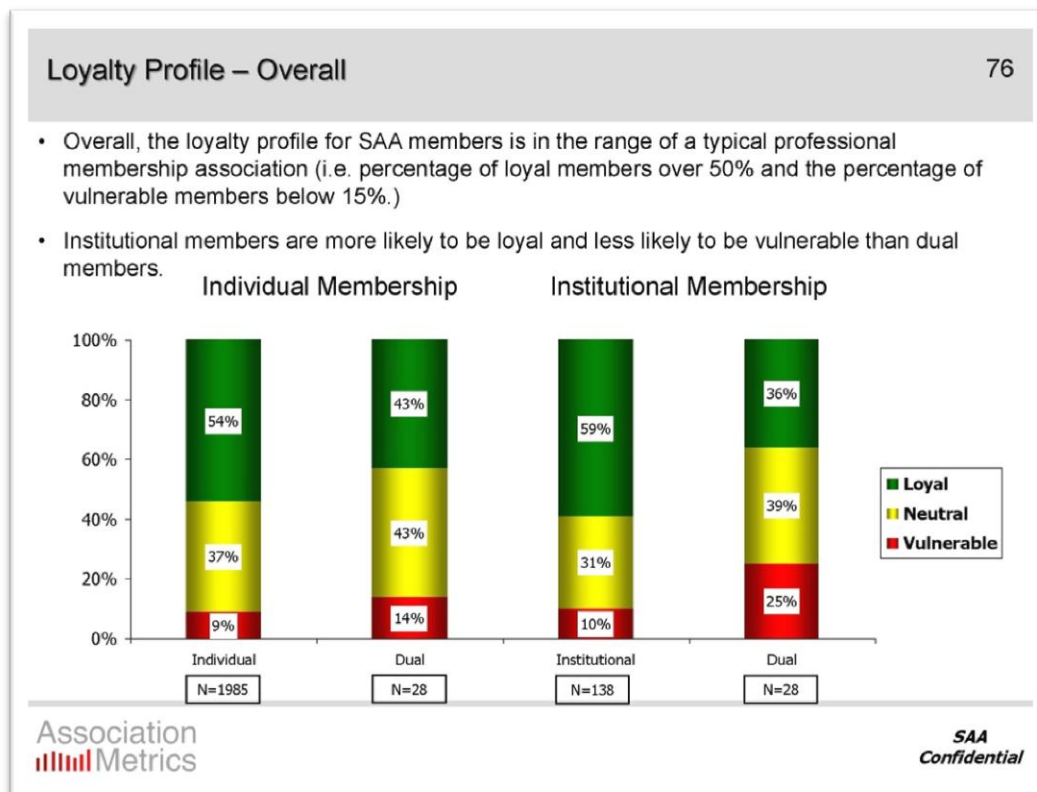


Slides 104 and 105 (see next page) display differences among so-called "captive members"— i.e., members who are likely to renew but who rate the overall value of SAA as marginal or poor. According to the survey consultant, the incidence of captive membership typically ranges between 0% and 5% and tends to be higher among associations that provide certification and/or other benefits that are required to practice in the profession. Approximately 6% of SAA individual members and 7% of institutional members fall into this category.

Analysis reveals that captive members belong to SAA for different reasons. They place relatively less value on staying current on information about the profession. Individual captive members place more value on career advancement and showing that they are professional. Institutional captive members place more value on showing that they are reputable and receiving journal subscriptions.

## Top Reasons For Individual Membership – Captive Members

- Individual members who are captive differ somewhat from other members in their reasons for belonging to SAA.

- Captive members are more interested in self-promotion - placing a higher priority on belonging to SAA to show that they are a professional and to advance their career.

- Conversely, non-captive members are more interested in self-improvement - placing a higher priority on staying current on information about the profession.
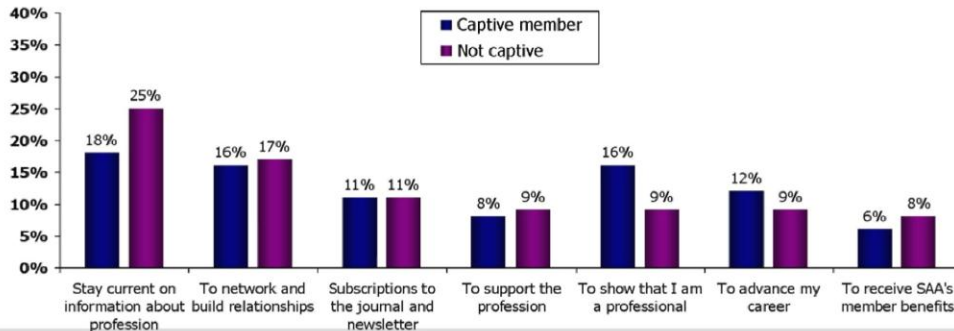


Q10. Individuals belong to associations for a variety of reasons. Please tell us the reasons why you belong to SAA. *Please allocate a total of 100 points among the following reasons, assigning more points to the more important reasons .*

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## Top Reasons For Institutional Membership – Captive Membership

- Institutional members who are captive also differ slightly from other members in their reasons for belonging to SAA.

- Captive members are more interested in promoting their institution - placing a higher priority on belonging to SAA to show that they are a reputable institution and getting periodical subscriptions.

- Conversely, non-captive members are more interested in self-improvement (placing a higher priority on staying current on information about the profession) and supporting the profession.
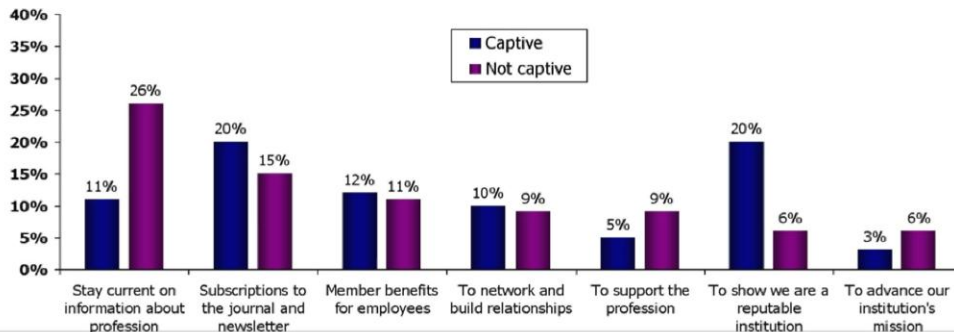


Q9Z. Institutions belong to associations for a variety of reasons. Please tell us the reasons why your institution belongs to SAA. *Please allocate a total of 100 points among the following reasons, assigning more points to the more important reasons .*

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Slides 115 and 116 are arguably the most important slides in the survey report. These charts display a two-dimensional "improve-maintain" matrix where:

- The horizontal axis represents *performance* of the specified programs or areas of activity. Items plotted in the right half of the matrix should be regarded as performing well.
- The vertical axis represents *impact* vis-à-vis overall member value—i.e., to what degree does high or low performance in the area correlate with respondents' general satisfaction with SAA. Items in the top half of the matrix should be regarded as having high impact.
- This yields a three-fold analysis in which:

> "Underperforming strong drivers, those that appear in the upper left (yellow) quadrant, should be considered for improvement. Items that appear in the upper right (green) quadrant are strong drivers of value and are currently performing adequately. Those items that appear in the bottom half of the matrix (white region) do not have a strong impact on value at this time. Improving any item in the lower half is not expected to have the same impact on membership value as improving any item in the yellow region."
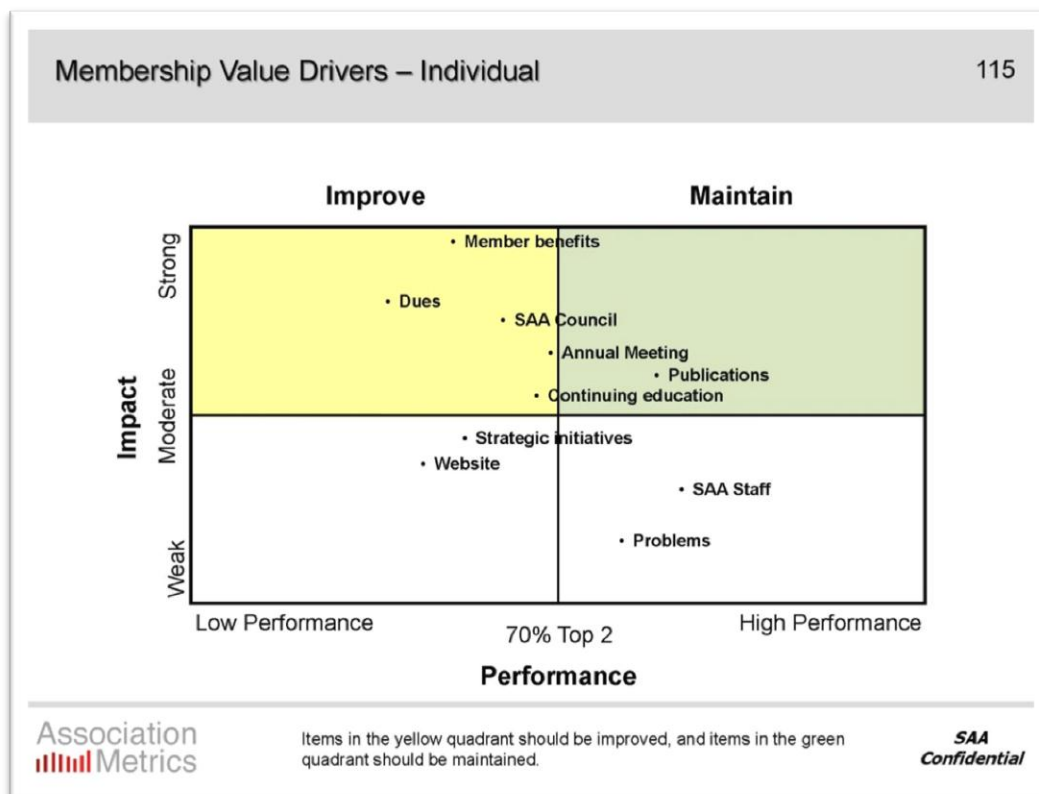


Therefore, according to Slide 115, to enhance individual member value SAA should focus its resources on improving performance (or the perception thereof) in: Member benefits; Dues; SAA Council; the Annual Meeting; and Continuing Education.

According to Slide 116, to enhance institutional member value SAA should focus its resources on improving performance (or the perception thereof) in: Member benefits; Dues; Strategic Initiatives; and the Annual Meeting.
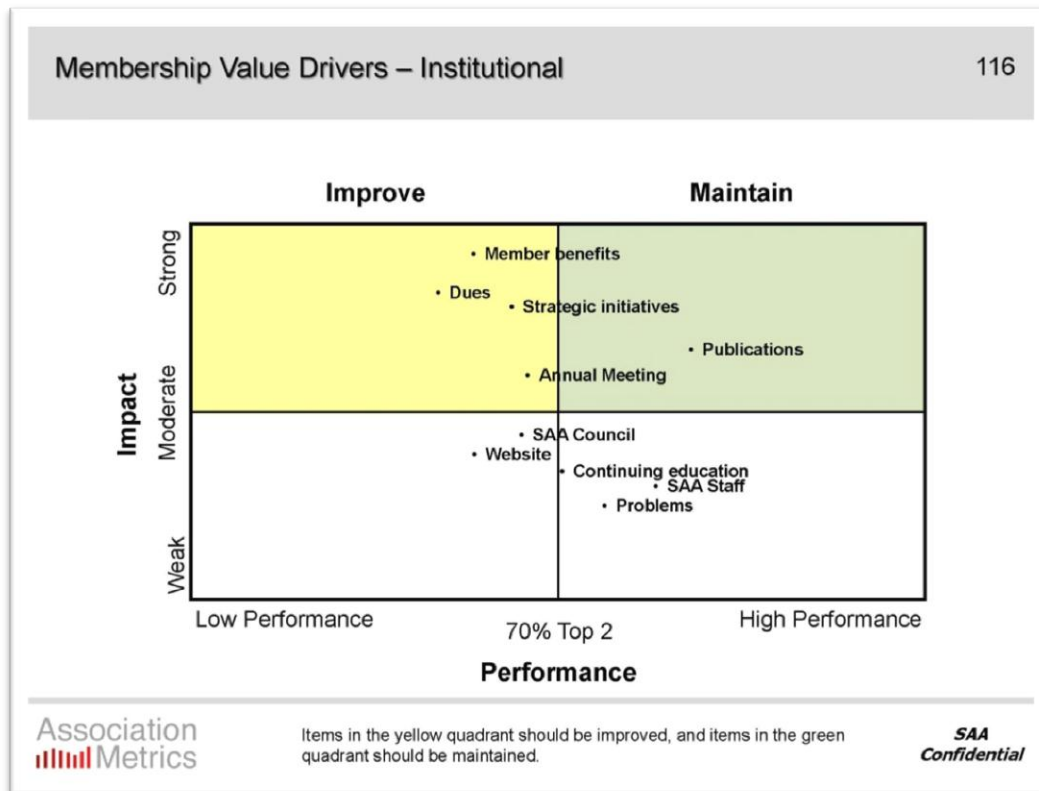


Slides 119-205 drill into the various programs or areas of activity that comprise Slides 115 and 116. Each section[*] includes an improve-maintain matrix that identifies that program/area's own value drivers, as well as analyses of benefits awareness.

Some sections included additional questions at the request of program stakeholders:

- Quality of continuing education delivery formats.
- Likelihood of pursuing continuing education according to workshop topic and type.
- Desirability of opting out from print-copy distribution for *Archival Outlook* and *The American Archivist*.
- Prioritization of areas for improvement vis-à-vis SAA's communication technology.
- Ownership of or likelihood to own different types of Internet devices.
- Prioritization of areas for improvement vis-à-vis the Annual Meeting.
- Price tolerance for Annual Meeting Wi-Fi service and online programming.

Responses to these questions were *not* factored into the multivariate regression analysis that generated the improve-maintain matrixes.
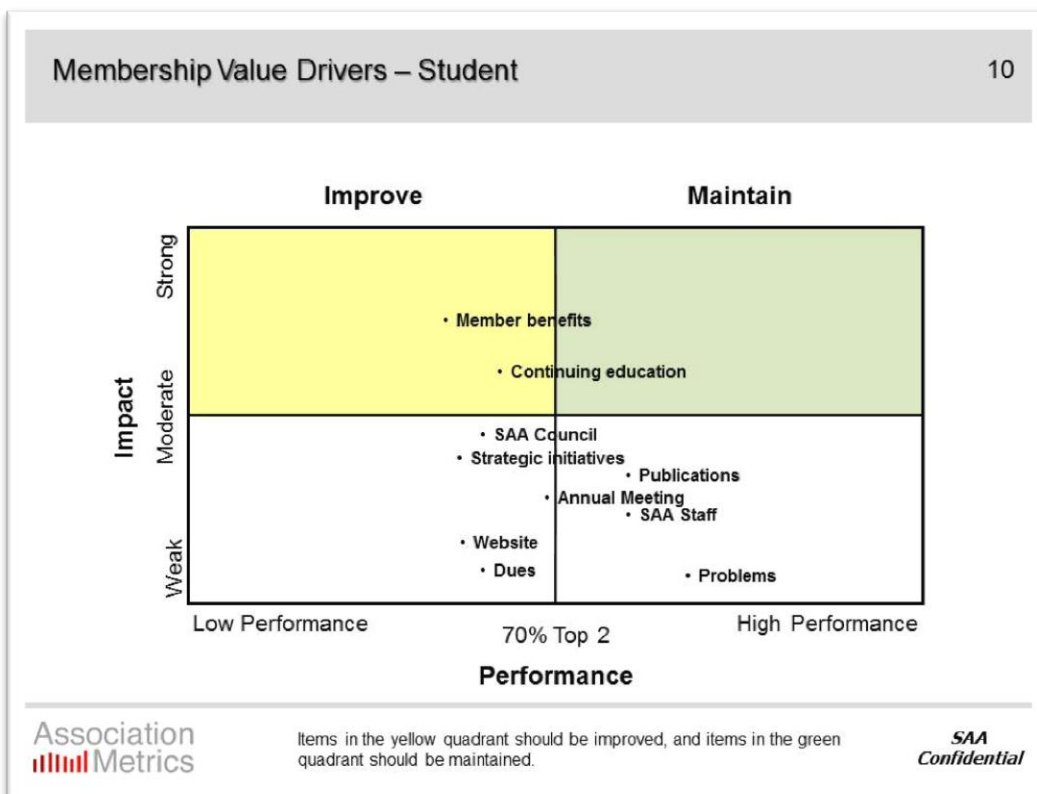
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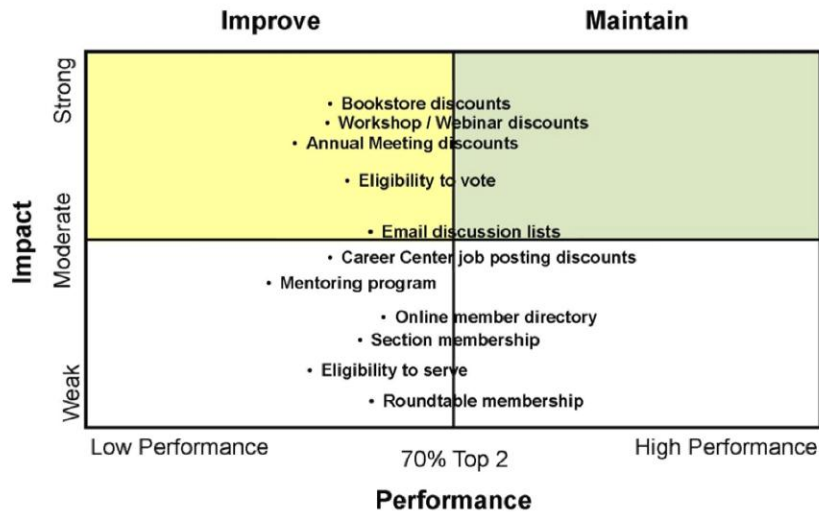[*] The sections on "Dues" and "Problems with SAA" are exceptions.

**DISCUSSION**

The survey consultant's conclusions and recommendations are displayed in Slides 210-215. Using these recommendations, combined with general knowledge about member trends as well as the Society's recent strategic activities, staff has prepared the following questions for the Council's consideration and discussion:

1. **What do Council members regard as the key "take-aways" revealed by this study?**

2. **What changes to strategic priorities, member programs, and/or benefits (if any) does the Council wish to consider and/or investigate as a result of these survey results?**

   The consultant's recommendation is that SAA "develop benefits and programs for specific member segments." For example, career advancement is a priority for many student members. Further, as displayed in Slide 10 of the report addendum, member benefits and continuing education are the primary drivers of student member value. Yet, as displayed in Slide 120 (next page), the programs that SAA historically has relied on to help members with career advancement (e.g., the Mentoring Program) appear to be low impact. Further investigation may be needed to confirm this—and/or SAA could consider other, new kinds of member benefits that would be more valuable to different member segments.



Membership Value Drivers – Student — 10

Items in the yellow quadrant should be improved, and items in the green quadrant should be maintained.

Membership Benefits Drivers – Individual Members                                    120

Items in the yellow quadrant should be improved, and items in the green quadrant should be maintained.

**3.** According to our consultant, "For areas that are currently not key drivers of membership value (e.g. website) … any **improvements of non-drivers should not take resources away from improving those areas that are the key drivers of membership value.**" What are the Council's reactions to this advice?

**4. Is further investigation necessary and/or desirable? If so…**

- Are there particular areas for investigation that should be prioritized?
- Are there particular methods that should be employed (e.g., focus groups)?
- Are there particular committees or component groups that should be called on for help?

**5.** According to our consultant, "**An integral part of any improvement plan is to communicate those changes to all members.** Communication informs members that improvements have been put into place even when members have not personally experienced any changes. Without communication, members who experience a higher level of service are left to wonder if the improvements are a permanent result of process changes or simply a temporary variation in the customary service level."

Who should be responsible for formulating key messages and developing a communication plan about this survey, as well as ongoing improvements to member programs?

Staff members believe that we should play a major role in both sets of activities because they intersect with "what we do." Does the Council agree? Does the Council see a need for others (Council members, component groups, etc.) to be enlisted instead or in addition?