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Interim Report: Task Force on Member Affinity Groups
(Prepared by Shawn San Roman, Chair)

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BACKGROUND

The Task Force on Member Affinity Groups (TF-MAG) is charged with considering the most effective affinity group structures which encourage flexible, inclusive, and participatory opportunities for the membership of SAA. This should include an evaluation of the effectiveness of current affinity groups (sections and roundtables) and consider whether re-structuring affinity groups might better serve members. The group is also charged with identifying what kinds of support and resources are needed to allow current and proposed potential affinity groups to work most effectively.

In meetings with President Danna C. Bell, she charged the Task Force with the freedom to "be creative" and think critically, broadly, and not be afraid to challenge the existing affinity structure. At the same time, she encouraged the Task Force not to recommend changes for the sake of making changes, and not to "reinvent the wheel." The goal is to examine the structure critically to see what items could use some tweaking and/or where significant changes could or should be made. The ultimate goal is to create a report of actionable items for the Council to consider and ultimately initiate.

MEETINGS

August -- Members of the TF-MAG met with in-coming President Danna C. Bell during "Office Hours" on Friday, August 16, at the SAA Annual Meeting. This was an opportunity for members to meet each other and get some background information about each member of the task force.

September -- The first official meeting of the TF-MAG occurred on September 10 via teleconference. Again, President Danna C. Bell attended the meeting along with the other members of the Task Force. This first meeting was geared toward reflecting on and sharing observations from the SAA Annual Meeting; as well as a general discussion of what each person thought of the mission of the Task Force. During this meeting, we discussed the rationale for the

committee, goals and objectives, and possible research designs. The purpose was to come to an initial consensus about the Task Force's mission and assign tasks. As part of this process, each member was requested to develop their own "proposal" for the October meeting. The thinking was to have each member develop their own unique: questions, subjects (leaders, sections/ roundtables, organizations, individuals, etc.), technical needs, and questions to SAA; then have the group consider the areas of overlap and commonality in order to develop a consensus about how the Task Force would achieve its mission. Below are the Task Force members' roles as assigned:

- **Snyder:** *Section and Roundtable Leadership Outreach.* Develop a way to consult with Section and Roundtable leaders in order to understand their needs and what they do.

- **Steele:** *Rationale and Functions of Section and Roundtables.* Research the developmental history, mission, function(s), and purpose of SAA Sections and Roundtables. Looking initially at their websites and social media.

- **Goldman:** *Needs of Non-Members (Non-Participants).* Develop a way to gain information about what non-members/non-participants of sections/roundtables, students, and others need, want, or think about how the current structure works or does not work for them and what changes might make them more active. (Potential coordination with the Annual Meeting Task Force.)

- **Dreyer:** *Survey of General Members.* Develop a method (survey) of the general membership to gain their understanding of SAA structure, Sections, Roundtables, etc., and what they want and need from the SAA in terms of deepening relationships, developing leaders, encouraging participation, etc.

- **San Roman:** *SAA Organizational History and Environmental Scan of Similar Organizations.* Examine the development of Sections, Roundtables, and organizational history of the SAA in order to place this research in context. Also, examining the structure of similar organizations (ALA, SLA, regional associations, ARMA, CoSA, etc.) to see how they organize their members, encourage participation, and grow future leaders.

The Task Force is utilizing Google Drive to share documents, Doodle Poll to coordinate meetings, and Google Hangout to facilitate video conferencing.

October -- The members of the TF-MAG met on October, via Google Hangout. Each member presented their "design" and findings from their background research. During this meeting it was agreed that research would continue in three directions: 1) examination of existing affinity structures and the potential changes that might make sense given criteria (as of yet undefined); 2) survey of the general SAA memberships about affinity groups and organizational structures; 3) survey of SAA leadership about affinity groups and organizational structures combined with interviewing a cross-section sample of these leaders.

November -- There was no official meeting during November. Members of the Task Force submitted survey questions and other questions to submit to SAA. After all the members had a

chance to submit questions, relevant questions for SAA were submitted to Nancy Beaumont. An additional 17 pages of questions were created for the planned membership survey -- these questions were derived from: Annual Meeting Evaluation Report (2013), A*Census (2006), Member Needs & Satisfaction Survey (2012), SAA Presidential Addresses, previous task forces' reports, and surveys of other organizations.

December -- Shawn San Roman met with Francine Snyder on December 17 and then Rachael Dreyer, on December 19, as the principle survey tool administrators. These meetings discussed the 17-pages of questions the Task Force has to consider. Rachael Dreyer was tasked with entering questions for the general membership survey while Francine Snyder was tasked with entering questions for the leadership membership survey into Survey Monkey. The goal is to have the survey questions entered by mid-January for review and testing.

Jordon Steele and Rebecca Goldman were intentionally separated from the survey development process at this point so they can provide "fresh eyes" once the survey has been designed in Survey Monkey. Their feedback will be used along with a small sample of close colleagues to make changes ahead of the survey's release to the SAA membership. Additionally, Jordon and Rebecca are conducting more research into alterative organizational structures. Some criteria for alternative structures are listed below:

1. **Supports --** Supports the goals and mission of SAA.
2. **Develops --** Supports development of archivists as leaders and provides structure for training and encouraging future leaders.
3. **Flexible --** Able to meet new challenges and/or create or eliminate groups in a timely manner. Don't want groups to wait years before new leadership finally sees merit in their group and don't want groups to hang-on without purpose because they have been around for a long time and no one wants to pull the plug or someone in power is "active" in that group.
4. **Defined Criteria --** So that reasonable people would create the same groups and/or new groups could be formed or dismantled (i.e.; geography, practice, medium, workplace, etc.). (Flow chart or matrix or taxonomy would be helpful).
5. **Exclusive --** In that there are defined roles which eliminate duplicated effort (for example; we now have the Committee on Advocacy and Public Policy (Council led), Issues & Advocacy Roundtable, and the Archives & Archivists of Color Roundtable have an Outreach & Advocacy Task Force, and Congressional Records Roundtable had a Task Force on Advocacy (2012) not to mention that just about every section/roundtable is doing their own Elevator Speech. Maybe duplicated effort is necessary, but might be nice to have some of these things with a centralized body that could collect and disseminate information.
6. **Responsibility --** Under this structure who would hold responsibility for creating, changing, eliminating, and overseeing (checking-up on) groups.
7. **Administratively Feasible --** The SAA staff should be able to reasonably adjust to changes and changes should not overly burden the staff.
8. **Fiscally Responsible --** Uses the SAA finances in a responsible manner (cost containment is preferred but not necessary if the changes make sense and are beneficial in the long run).

Furthermore, the Task Force is examining various membership organizations to determine how they organize their members and whether or not those structures might be useful. While this list

is too detailed to provide in this update, some initial reflections are that; Geography, Function (job duties), Demographics (Gender, Race), Institution Type all play significant roles in how organizations choose to organize their members. These same factors are at play within the organization of archivists.

FUTURE PLANNING

The Task Force is confident that a survey tool will be ready for distribution by the beginning of February. The plan is to allow February and March (60 days) for the general survey to be completed. A first call will be announced in February, a second call in mid-February, with a third and fourth call in March. The time the survey is open however is subject to change, as most respondents are likely to answer in the first couple of weeks (passed on reports from A*Census and others).

March and April will be used to conduct the leadership cross-section interviews.

April-June will be utilized to assess the data collected.

June-July will be utilized to finalize findings and create recommendations.

RECOMMENDATIONS

The Task Force does not have any preliminary recommendations at this time. What should be noted is that the Task Force is considering both minor and major changes based on a historical survey of past SAA practices and similar associations. The surveys will be used to determine the leanings (openness to change and reactions to "proposed" changes) of members and leaders. Accordingly, there may be items in the survey that are neither feasible nor recommended, but the Task Force believes should be discussed in this context. More significantly, the survey may help determine how the SAA seeks to evolve and interact with other archival associations, as well as other information associations.