Special Libraries Association
Philadelphia Chapter

Strategic Plan

May 2012
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Executive Summary for the 2012 Strategic Plan

In December 2011, the Executive Board of the Philadelphia Chapter of the Special Libraries Association identified a need to revise the chapter’s Strategic Plan. The last revision of this document occurred in July 2001.

To address this need, the Chapter’s Executive Board formed a Strategic Planning Committee in January 2012. In March 2012, the Committee distributed an electronic survey to Chapter members to garner feedback on the Chapter’s activities and to help formulate the future direction of the Chapter. The survey results serve as the basis for this Strategic Plan.

The Chapter’s 2012 Strategic Plan consists of a Vision Statement and a Mission Statement, along with four Values. These Values center around the key activities and purpose of the Chapter, as indicated by members in their survey responses. In addition, the Strategic Plan provides recommendations for meeting these goals over the next two-year period.

The Values of the 2012 Strategic Plan are:

- Community
- Technology
- Membership
- Programming

The Strategic Planning Committee intends to provide a “progress report” after twelve months to update the Chapter on the status of these initiatives.

The Executive Board of the Philadelphia Chapter of the Special Libraries Association would like to thank Brian DeMarchi, Brian Fulton, Robert Guerrero, Rod MacNeil, Jack Morris, Kate Pettegrew and Valerie Ryder for their work on the Strategic Planning committee.
Vision and Mission Statement for the 2012 Strategic Plan

VISION:

The Philadelphia Chapter of the Special Libraries Association will be the association of choice for information professionals in the Chapter’s service areas of Pennsylvania, New Jersey and Delaware.

MISSION:

The Philadelphia Chapter of the Special Libraries Association promotes the networking and professional development of area information professionals. We believe in and foster life-long learning in a dynamic environment through the use of meetings and cutting-edge technologies. We help our members gain the necessary tools to fulfill and surpass the expectations of their clients.
Values and Goals for the 2012 Strategic Plan

Chapter Values and Goals for 2012-2013:

The Strategic Planning Committee identified four Values for helping the Chapter realize its vision and mission statement. The Strategic Planning Committee also identified nine Goals for directing Chapter resources and energies over the next two years to support our Chapter’s Values.

These goals are discussed in detail in this strategic plan, along with twenty-eight Recommendations for implementation, timelines for completion, and Chapter entities responsible for overseeing the process.

♦ Community

1. Improve communication with Chapter members
2. Encourage connections with members at the regional level
3. Reach out to student chapters at library schools servicing our region

♦ Technology

4. Update the Chapter's use of technology
5. Provide virtual delivery of programs and meetings

♦ Membership

6. Recruit and retain Chapter members
7. Strive to provide opportunities for involvement to all members

♦ Programming

8. Provide high-quality programming geared toward member needs
9. Promote partnerships between chapters, divisions, and other associations
Community

The stated mission of the Chapter is to bring information professionals together in-person and virtually to explore common issues, to enhance skills and to foster a communal spirit and identity. In order to do this, Chapter members rank networking opportunities as one of the most important functions the Chapter provides. The Chapter has considerable experience hosting large, centralized formal social gatherings. The goals in this section are intended to build upon those successes by creating other types of events to connect members with one another.

Goals, Recommendations and Responsibilities

Improve communication with Chapter members

- Initiate “State of the Chapter” communications with members to foster chapter activity transparency
  - Target Implementation: 2012 (Q2)
  - Responsibility: Chapter President

- Continue to use listserv to disseminate news and information of interest to Chapter members (e.g. Job announcements, programs from our Chapters and other chapters)
  - Target Implementation: 2012 (Ongoing)
  - Responsibility: Website Committee

Encourage connections with members at the regional level

- Foster regional networking events (1-3 per year / per region)
  - Target Implementation: 2013 (Q1-Q4)
  - Responsibility: Program Chair / President-Elect

- Develop 3 local programming chairs and committees (Central PA, Lehigh Valley/Northeast PA, Delaware)
  - Target Implementation: 2013 (Q4)
  - Responsibility: Membership Chair / Chapter Executive Board
Reach out to student chapters at library schools servicing our region

- Identify regional students participating in distance education programs
  - Target Implementation: **2012 (Q4)**
  - Responsibility: **Student Relations chair / Chapter Executive Board**

- Sponsor one student-specific event per year to encourage relations
  - Target Implementation: **2013 (Q1-Q4)**
  - Responsibility: **Program Chair / President-Elect**

- Encourage chapter participation and sponsorship of student social events
  - Target Implementation: **2012 (Q3-Q4)**
  - Responsibility: **Student Relations chair / Chapter Executive Board**
Technology

Technology is central to how Chapter members do their work in their careers, and to how the Chapter services its members. In a recent survey, 81.8% of respondents indicated that programs focusing on “New Technology” are “Important”. In addition, Chapter members have indicated investing time and money on technology as key to keeping the Association relevant. Finally, 77% of survey respondents would like to see more opportunities for virtual involvement through Webinar-based programs and virtual volunteer opportunities. As a result, we identify Technology as a key value to the Chapter and a cornerstone to its future success.

Goals, Recommendations and Responsibilities

Update the Chapter's use of technology

- Conduct a content management overview of the Chapter’s website
  - Target Implementation: 2012 (Q2)
  - Responsibility: Publications chair / Website Content Committee

- Update the Chapter’s website to the latest version of WordPress
  - Target Implementation: 2012 (Q3)
  - Responsibility: Webmaster / Website Content Committee

- Establish a Chapter-wide social media policy
  - Target Implementation: 2012 (Q3)
  - Responsibility: Public Relations chair

- Develop ways to push content from website to members via mobile technology and social medial channels (i.e. Twitter, LinkedIn, etc.)
  - Target Implementation: 2012 (Q4)
  - Responsibility: Website Committee

- Automate / integrate social media communications into the Chapter’s website
  - Target Implementation: 2013 (Q1)
  - Responsibility: Webmaster
• Educate Advisory Council chairs on using the Chapter’s website as a communication tool
  - Target Implementation: 2013 (Q1)
  - Responsibility: Chapter Executive Board

Provide virtual delivery of programs and meetings

• Identify technology needs of the Chapter for investment purposes
  - Target Implementation: 2012 (Q4) [Identify and budget funds]
  - Target Implementation: 2013 (Q1) [Purchase and deploy]
  - Responsibility: Chapter Executive Board

• Record and archive all programs for on-demand viewing
  - Target Implementation: 2013 (Q2)
  - Responsibility: Program chair / Webmaster
Membership

Membership is the Chapter's lifeblood. It is the responsibility of the Chapter to engage its members and meet their needs. According to our recent survey, the Chapter's biggest challenges regarding membership are recruitment, involvement, and retention. To address these issues and to help engage new members, the Chapter is embarking on several initiatives, including a mentorship program and special programming for members in their first three years. The Philadelphia Chapter values its members -- without whom the Association and the Chapter would not exist.

Goals, Recommendations and Responsibilities

Recruit and retain Chapter members

• Create a mentoring chair for the chapter’s Advisory Council
  o Target Implementation: 2012 (Q4)
  o Responsibility: Chapter Executive Board

• Investigate a mentor outreach program between students and professionals
  o Target Implementation: 2013 (Q1)
  o Responsibility: Membership committee / Programming chair

• Establish a mentoring program for professionals in their first three years of chapter membership
  o Target Implementation: 2013 (Q2)
  o Responsibility: Membership chair / Membership committee

• Reach out to lapsed members (last 18 months) to inquire about their decision
  o Target Implementation: 2012 (Q4)
  o Responsibility: Membership chair

Promote opportunities for involvement to all Chapter members

• Create a “Welcome New Member” subcommittee
  o Target Implementation: 2012 (Q3)
  o Responsibility: Chapter Executive Board / Membership committee
• Provide event vouchers to new members for free admission to one chapter social/networking event during first 12 months of membership
  o *Target Implementation:* 2013 (Q1)
  o *Responsibility:* Chapter Executive Board

• Investigate the creation of a “Chapter Board” mentoring program that focuses on leadership training
  o *Target Implementation:* 2012 (Q3)
  o *Responsibility:* Membership committee / Programming chair
Programming

The Chapter’s selection of programs is one of the most important services available to members. Our programs provide one of the few ways for information professionals to improve their skills, acquire new knowledge, and develop as professionals. However, due to geographic limitations, more and more members require Webinar-based programs and virtual learning experiences. It is imperative for the relevancy of the Chapter to provide enhanced professional development offerings.

Goals, Recommendations and Responsibilities

Provide high-quality programming geared toward member needs

- Offer high-quality programs in person and virtually on topics of relevance to members’ interests
  - Target Implementation: 2012 (Ongoing)
  - Responsibility: Program chair / President-Elect

- Establish practice of program delivery via webinars (as appropriate)
  - Target Implementation: 2012 (Ongoing)
  - Responsibility: Program committee

- Offer at least one program per year on a technology-related topic
  - Target Implementation: 2013 (Q1)
  - Responsibility: Program committee / Website Committee

- Develop a professional development workshop for members (half-day, full-day, or multi-day event)
  - Target Implementation: 2013 (Q3)
  - Responsibility: Program Committee / Website Committee

- Design special programs for members in their first three years of Chapter membership and those experiencing career transitions.
  - Target Implementation: 2013 (Q2)
  - Responsibility: Membership committee / Programming chair
Promote partnerships between chapters, divisions, and other associations

- Establish a liaison responsible for connecting with other chapters, divisions, and associations to discuss partnerships
  - Target Implementation: 2013 (Q1)
  - Responsibility: Chapter Executive Board
Overview and Summary

The 2012 Strategic Plan for the Philadelphia Chapter of the Special Libraries Association is designed to serve as a road map for the Chapter over the next two years. The goals and recommendations listed in this document are derived directly from Chapter member feedback and are designed to reflect their expectations and needs.

This plan expresses the Chapter’s Vision and Mission, along with four values that support those statements (Community, Technology, Membership and Programming). In addition, the committee is recommending 28 actionable items to lead this transition. The responsibility for executing these recommendations lies with the chapter’s Executive Board, along with members of the chapter’s Advisory Board.

The Strategic Planning Committee intends to provide a “progress report” after twelve months to update the Chapter on the status of these initiatives. The report will be submitted at the 2013 Annual Banquet.
Bibliography:


APPENDIX A
SLA Strategic Plan Recommendations -- 2012-2013

1. Initiate “State of the Chapter” communications with members to foster chapter activity transparency
2. Continue to use listserv to disseminate news and information of interest to Chapter members (e.g. Job announcements, programs from our Chapters and other chapters)
3. Foster regional networking events (1-3 per year / per region)
4. Develop 3 local programming chairs and committees (Central PA, Lehigh Valley/Northeast PA, Delaware)
5. Identify regional students participating in distance education programs
6. Sponsor one student-specific event per year to encourage relations
7. Encourage chapter participation and sponsorship of student social events
8. Conduct a content management overview of the Chapter’s website
9. Update the Chapter’s website to the latest version of WordPress
10. Establish a Chapter-wide social media policy
11. Develop ways to push content from website to members via mobile technology and social medial channels (i.e. Twitter, LinkedIn, etc.)
12. Automate / integrate social media communications into the Chapter’s website
13. Educate Advisory Council chairs on using the Chapter’s website as a communication tool
14. Identify technology needs of the Chapter for investment purposes
15. Record and archive all programs for on-demand viewing
16. Create a mentoring chair for the chapter’s Advisory Council
17. Investigate a mentor outreach program between students and professionals
18. Establish a mentoring program for professionals in their first three years of chapter membership
19. Reach out to lapsed members (last 18 months) to inquire about their decision
20. Create a “Welcome New Member” subcommittee
21. Provide vouchers to new members for free admission to one chapter social/networking event during first 12 months of membership
22. Investigate the creation of a “Chapter Board” mentoring program that focuses on leadership training
23. Offer high-quality programs in person and virtually on topics of relevance to members’ interests
24. Establish practice of program delivery via webinars (as appropriate)
25. Offer at least one program per year on a technology-related topic
26. Develop a professional development workshop for members (half-day, full-day, or multi-day event)
27. Design special programs for members in their first three years of Chapter membership and those experiencing career transitions.
28. Establish a liaison responsible for connecting with other chapters, divisions, and associations to discuss partnerships
<table>
<thead>
<tr>
<th>2012</th>
<th>COMMUNITY</th>
<th>TECHNOLOGY</th>
<th>MEMBERSHIP</th>
<th>PROGRAMMING</th>
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<tbody>
<tr>
<td>Q2</td>
<td>Initiate “State of the Chapter” communications</td>
<td>Conduct a content management overview of the Chapter’s website</td>
<td></td>
<td>Offer high-quality programs in person and virtually</td>
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<td>Q1</td>
<td>Foster regional networking events</td>
<td>Automate social media communications into the Chapter’s website</td>
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<td>Establish a liaison responsible for connecting with other chapters</td>
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<td>Q2</td>
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<td>Develop 3 local programming chairs and committees</td>
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THE CHAPTER’S VALUES

1. Based upon your experience with the Philadelphia SLA Chapter, how well do these core tenets describe the Chapter’s core values?

Purpose of Question: To match the perceived values of the Chapter with the values of the Association.

Findings:
- The five stated values received were uniformly matched as very well or pretty well by the survey participants.
- Two values, Leadership and Innovation/Continuous Learning scored the highest of the five values.
- Results and Accountability scored the lowest and was the only one of the five values to have scored at least 25% in the somewhat category.

2. How well do the five values listed above match your principles?

Purpose of Question: To match the perceived values of Chapter members with the values of the Association.

Findings:
- All five values were highly ranked as very well with a range of 63% for leadership to 75% for service.
- Leadership and Collaboration/Partnering were ranked about 25% in the pretty well category.
- Leadership and Results/Accountability received an 11% ranking in the somewhat category; the other three values had few ticks in that category.

3. Can you envision these values still being valid for the Chapter in....?

Purpose of Question: To allow Chapter members to identify the long-term validity of these values.

Findings:
- Overwhelmingly Chapter members who responded to the survey felt that these five values would still be valid in 2015.
- There was less assurance but still strong (in the 60-70% range) for the validity of these values in the distant future (2030 and 2050).

4. Do other values come to mind when thinking about the Philadelphia SLA Chapter?

Descriptive

Purpose of Question: To allow Chapter members to identify Chapter values that may not match with the values of the Association.

Findings:
- Only 16 members answered this question; the vast majority (more than 65) skipped the question.
- It doesn’t seem like any other values rose to the top: several folks listed collegiality or friendship or camaraderie or mutual support—in a professional association, I would think that Collaboration and Partnering captures the essence of these sentiments. I also think that friendship or mutual support might be seen as more of an outcome than a value.
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**THE CHAPTER’S PURPOSE**

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**5. MEETINGS: How important are the following activities to you?**

Purpose of Question: **To identify the importance to Chapter members of various types of meetings and events (activities) hosted by the Chapter.**

Findings:
- Members are most interested in programs focusing on “New Technology” (81.8% rated it as “Important”) and on “New Skills” (79.2%)
- Members are least interested in program focusing on “Community Service” (15.6% rated it as “Important”)
- Members rated Networking Events (39% important) and Formal Social Gatherings (37.7%) but when combining the “Important” and the “Somewhat Important” categories, Networking rates at 92.2% and Formal Social Gatherings at 81.9%.

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**6. MEETINGS: Of these types of programs, which one is the Chapter MOST effective at delivering? LEAST effective? (Please choose one activity as MOST and one as LEAST)**

Purpose of Question: **To identify the effectiveness of the Chapter in delivering various types of meetings and events.**

Findings:
- The Chapter is most effective at delivering meetings and events related to Formal Social Gatherings (40.9%) and Networking Events (33.3%)
- The Chapter is least effective at delivering meetings and events related to Community Service (45.5%) and New Skills (25.8%)

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**7. SERVICES: How important are the following services to you?**

Purpose of Question: **To identify the importance to Chapter members of services provided by the Chapter.**

Findings:
- Jobs/employment alerts got by far the highest rating with 76.6 % saying it was “Important.”
- The Chapter’s website was second at 52.6% (important) followed by the Knower Awards (32.9%) and Volunteer Opportunities (24.7%).
- Awards to Members (13.2% important) and Speaking/writing opportunities (15.6%) finished at the bottom.

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**8. SERVICES: Of these types of services, which one is the Chapter MOST effective at delivering? LEAST effective? (Please choose one service as MOST and one as LEAST)**

Purpose of Question: **To identify the effectiveness of the Chapter in delivering services to Chapter members.**

Findings:
- By far the most effective service we provide is the Job alerts (75.7 “most effective). Chapter website (9.5%) and Knower awards (8.1%) were distant second and third.
- The least effective service is speaking/writing opportunities (40%) followed closely by volunteer opportunities (38.6%). Only one person voted that Job Alerts was our least effective service.

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**9. PROFESSIONAL ADVOCACY How important are these efforts to you?**

Purpose of Question: **To identify the importance to Chapter members of professional advocacy efforts.**
Findings:
- 66.2% thought it was important to enhance the image of the profession while 63.6% thought it was important to raise our profession’s awareness to those outside our community.
- Promote the association’s value to its members was at 46.8% for “important” while Raise our awareness to legislative involvement and activities got rated as important by 35.1%.

10. PROFESSIONAL ADVOCACY: Of these advocacy efforts, which one is the Chapter MOST effective at delivering? LEAST effective? (Please choose one activity as MOST and one as LEAST)

Purpose of Question: To identify the effectiveness of the Chapter in providing professional advocacy.

Findings:
- 54.2% thought that we were most effective at promoting the association’s value.
- 58.3% thought that we were least effective at legislative involvement and activities

11. In your own words, what is the purpose of the Chapter?

Purpose of Question: To provide Chapter members with an opportunity to describe the purpose of the Chapter in their own words.

Findings:
- In the 77 responses written, 52 mentioned networking as a purpose of the Chapter. It was clear that meeting fellow librarians and sharing ideas and knowledge was of the highest importance.
- There were a couple of people who felt that networking was over emphasized by the Chapter.
- In lock step with networking was learning/professional development. Often the two were tied together. Providing professional development was very important.

The group’s opinion was best summed up by this remark:

To provide a mechanism for professional networking, continuous education and personal growth (like leadership, teamwork and communication skills) in a hopefully supportive and non-threatening way to enhance and improve one's career, professional skills and hopefully make some new personal friends to boot!

THE CHAPTER’S GOALS

12. Where should the Chapter focus its energies over the next 3 to 5 years? (pick all that apply)

Purpose of Question: To identify Chapter member perception of the goals of the Chapter over the next 3 to 5 years.

Findings:
- The findings were equally divided between Technology (63.6%) and Membership (62.1%), indicating two specific desires where members expect the chapter to focus its energies
- Although there is a drive among the chapter’s current leadership to establish a Knower Fellowship, only 28.8% of respondents feel it is an initiative the chapter should focus on.
- Some other responses to this question relate to: helping librarians cope with a rapidly changing information environment, professional development opportunities, continuing education, and informative events.

13. Which ONE of the goals (listed above) is MOST important to you? (check only ONE)

Purpose of Question: To identify the most important goal to Chapter members over the next 3 to 5 years.
Findings:
- The most important goal to Chapter members is to invest time and money on technology (31.8%) and on recruiting and retaining Chapter members (27.3%).
- Increasing social events (25.8%) was also a very important goal.
- Establishing a Knower Fellowship (6.1%) received the least amount of support.
- Other goal ideas included: “events of a social and educational nature”, “professional development”, and ensuring we have “meaningful things for members to DO”

14. **What is the biggest challenge facing the Chapter over the next 3 to 5 years?**

Purpose of Question: To provide members with an opportunity to verbalize what they see as the biggest challenges facing the Chapter in the future.

Findings:
- Survey respondents strongly believe that membership is the chapter’s biggest challenge going forward, getting young people involved, and staying relevant.
- Another challenge facing the chapter is competition with other information professional organizations.
- One challenge frequently mentioned is the decline of special libraries as a whole.
- Finally, aging membership was often cited by members as a major challenge.

15. **How do we address and/or solve that challenge?**

Purpose of Question: To provide members with an opportunity to provide solutions or courses of action for addressing the Chapter’s future challenges.

Findings:
- Regarding the decline of special libraries -- providing assistance to members who lose their job was noted as a way of promoting the association.
- Regarding membership -- sending welcome messages to new members, reaching out to members individually (as we recently started to do), and contact lapsed members and ask them to attend an event for free as a way of reconnecting with them. Also, a mentoring program to engage young professionals.
- Regarding the association’s relevancy -- increase public relations, invest in technology, and do more work with other local library organizations to demonstrate our worth. (Great answer!)
- And the best of the bunch? “Good luck!”

THE CHAPTER'S VIVID DESCRIPTION OF THE FUTURE

16. **Let's start with you. Where do you see yourself in...**

Purpose of Question: To identify the long-term professional goals and plans of Chapter members.

Findings:
- Nearly 50% of members see themselves changing careers outside of the information field within the next 3-10 years.
- SLA Philly members are for the most part unsure about their future roles and careers over the next 10 years.
- Most (65.5%) expect to be with their current organization in their current role for the next 3 years, but only 10.3% expect to still be there in 10 years.

17. **This question addresses the Philadelphia chapter's alignment with SLA HQ's strategic focus:**

*Cindy Romaine, past-president of SLA, recently discussed the Association’s Vision and identified key areas of focus at the SLA National level.*
For the Philadelphia chapter, which area do you see being MOST important over the next 3 to 5 years? Which one is LEAST important?

Purpose of Question: To identify how the Philadelphia Chapter should best align itself with SLA HQ’s strategic focus.

Findings:
- The vast majority (78.4%) of SLA Philly members felt the most important focus area is for us to offer enhanced professional development offerings.
- Least important for people is to see chapter involvement at the annual conference, followed by volunteer opportunities and diversifying offerings for special interest groups.
- A few (9.5%) would like to see further collaboration with local library and information science programs and vendors.

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18. What can be done to make members feel more involved in the Chapter? (check all that apply)

Purpose of Question: To provide members with an opportunity to express their opinion regarding member outreach and engagement.

Findings:
- Most (77%) would like to see more opportunities for virtual involvement. WebEx programs and virtual volunteer opportunities were mentioned in the comments.
- All suggestions provided seem important to SLA Philly members (more info through social media, regional group meetings, more virtual involvement, mentorship program, special interest group meetings).
- While the development of a formal mentorship program was selected the fewest (45.9%), half of the comments mentioned they would like a mentorship program, or at the very least someone to reach out to new members.
- Three comments suggested special programming for new members in their first 3 years, such as providing mentors, getting them involved in committee work, or the formation of a membership committee to reach out.
THE CHAPTER’S DEMOGRAPHICS

19. Your information

Purpose of Question: To identify survey participants

Findings:
- Respondents entered their home zip codes and their work zip codes. This information needs to be graphed to provide a visual representation of the chapter’s membership. This graphic representation would be very revealing from a programming and a membership perspective.
- 61 responses in total to the survey. 13 people who started the survey did not complete it.

20. Do you prefer programs and events closer to home or to work?

Purpose of Question: To identify preferences regarding programming and event location

Findings:
- 70.5% of respondents are fine with programs and events that are either close to their work or to their home.

21. How long have you been a member of the SLA Philadelphia chapter?

Purpose of Question: To identify the tenure of Chapter members

Findings:
- The largest group of respondents have been members for a period of 2-5 years (31.1%). In real numbers, this was a total of 19 respondents out of a possible 61 people who completed the survey.
- All respondents were chapter members.
- Those who have been members of the chapter for 20+ years made up 13.1% of respondents