

STARTING A LOCAL SAS USERS GROUP: SOME ISSUES AND GUIDELINES

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ABSTRACT

Drawing upon the experiences of two New England SAS users groups (Hartford and Boston), this paper identifies major issues involved in starting a local SAS users group, and suggests several options and practical guidelines for addressing these issues.

Initially, the discussion is directed to any potential organizer(s) of a local users group, in terms of the time and resources required on their part, specific ways of reaching potential members, and the necessary preparations for--as well as the actual conducting of--the first meeting. Attention is then shifted to the decisions facing the group as a whole. These include: the group's objectives, structure and leadership; the frequency and format of meetings; various administrative concerns and the question of operating expenses. Finally, several options for subsequent meetings are presented, such as varying presentation formats, forming special-topic subgroups, organizing workshops and hosting social events.

Given the diverse nature of members' needs and backgrounds, the structure and orientation of emerging SAS users groups can be expected to differ considerably. However, the issues and guidelines presented are relevant to all new users groups, and should help a new group to avoid undue floundering during its formative stages.

INTRODUCTION

Who typically starts a local SAS users group? If you are inclined to think that such an endeavor falls exclusively within the domain of highly motivated, "take charge" individuals positively reeking of leadership capabilities and experience, then you very well might be mistaken. Charisma you don't need. On the other hand, commitment, time, persistence, a telephone, a fixed address and a modest investment in postage stamps are all indispensable prerequisites. So, if you find yourself eagerly scanning the contents of SAS Communications, only to find that an announcement of a new users group in your area is conspicuous by its absence, then perhaps it is time to re-evaluate your own role in the broader scheme of things. If you seriously think that there is both a need and a potential for a users group in your area, and if you can muster up the foregoing resources, then you are the one who should start the group. It's as simple as that.

The following sections will let you know, in practical terms, just what you are getting yourself into, and will provide guidelines for handling each of the major steps along the way.

TAKING THE FIRST STEPS

Your first step should be to verify there is not already a users group either in existence or in the planning stages in your area. To this end, you might want to contact the SAS Institute directly. Assuming that the field is clear, your initial efforts should then be focused upon two major objectives: to identify and establish contact with your group's potential members; and to make preparations for your first meeting.

Reaching Potential Members

The simplest way of reaching potential members is to announce the formation of your group in SAS Communications. Your request should be forwarded to:

Editor
SAS Communications
Box 8000
Cary, NC 27511
(919) 467-8000

Be sure to include your name, address, telephone number, geographic area covered (Boston, San Diego/Los Angeles, etc.) and special interest topic limitations, if any (i.e., CPE).

Since SAS Communications is published on a quarterly basis, there may be some delay between your decision to start a users group and the appearance of the announcement signaling its formation. Also, since there are conceivably many SAS users who do not receive this publication, this approach may not reach the full body of your group's potential membership.

To supplement this approach, then, you might want to contact each SAS installation in your area directly. A list of all SAS installations in your state can be obtained from the SAS Institute. Also, depending upon their policy, you might also be able to obtain the names of the technical or educational representatives for each site.

Another option is to get in touch with other SAS users whom you either know of or are acquainted with. Within your own company, for example, your SAS coordinator might be able to provide you with the names of users, or at least with a list of departments which use SAS.

Preparing for the First Meeting

Hopefully, your own company will be able to provide the necessary facilities for the first meeting. If not, then your first priority will be to secure a commitment from another potential member regarding a meeting site. As far as the date is concerned, allow sufficient time for area users to respond to your announcement, and

for you to compile information about the new members (4 to 8 weeks should be sufficient). Also, mid-week meetings held in the afternoon seem to pose the fewest conflicts. From each SAS user responding, then, obtain both a mailing address and a telephone number, since you will want to mail announcements of the upcoming meeting to them as well as telephone to confirm attendance.

Other groups have found it useful to survey their initial membership before the first meeting. This allows for an early grasp of the group's composition in terms of the members' backgrounds, interests and expectations, and also eliminates a good deal of "housekeeping" tasks during the first meeting. Also, members attending can be provided with immediate feedback concerning the group as a whole.

From a simple survey administered to new Hartford area SAS users, it was possible to generate profiles for each member and to distribute these during the first meeting (parts of the questionnaire used are shown in Figure 1). In an open-ended question, the survey instrument also elicited members' expectations regarding the new group. Most members indicated that they expected the group to provide:

- A chance to meet other SAS users;
- A means of establishing contacts for assistance in problem solving; and
- A forum for users to exchange experiences.

Also, the survey was used to elicit opinions concerning the following:

- Frequency of meetings;
- Organization of the group (chartered vs. informal);
- Time of meetings (during or after business hours);
- Length of meetings;
- Structure of meetings (number and format of presentations, etc.);
- Members' willingness to present a topic; and
- Ability of members' companies to host a meeting.

HARTFORD AREA SAS USER GROUP - MEMBER PROFILE

I. NAME: _____ (First) _____ (Initial) _____ (Last)

II. COMPANY INFORMATION
 Name: _____
 Address: _____
 City: _____ State: _____
 Zip: _____ Business Phone: (____) _____ Ext. _____

III. CURRENT POSITION
 a) Title: _____
 b) Description: _____

IV. OPERATIONAL CONSIDERATIONS
 A) Indicate the timesharing environment where SAS is available in your company. (Check all appropriate boxes)
 VM/CMS TSO OTHER _____

B) What percentage of your own SAS programs are executed in the following environments?
 Timesharing _____ %
 Batch _____ %
 Total _____ %

V. In what capacity do you use SAS? (Check all appropriate boxes)
 Technical Support (install/maintain SAS releases)
 Application Development (design and/or coding of SAS routines)
 Administration (supervision of SAS users)
 Education (conduct training sessions)
 Other _____

(Please complete reverse side)

VI. Indicate the availability of the following SAS products at your company and the extent of your overall proficiency, actual usage and general interest by entering either 'N', 'S' or 'E' in the following table.

Where: N = None
 S = Some
 E = Extensive

CHECK IF AVAILABLE (✓)	SAS PRODUCT	PROFICIENCY	USAGE	INTEREST
	SAS Basics (reports preparation, data manipulation, simple procedures (TREQ, PRINT), etc.)			
	SAS Statistical Procedures			
	SAS/GRAPH			
	SAS Supplemental Library Procedures			
	Econometrics and Time Series Library Procedures (ETS)			
	Full Screen Product (FSP)			
	IMS-DL/1 Interface			
	CPE			

VII. Please indicate how you utilize SAS in your current position. Briefly describe typical and novel (if any) applications. If more space is needed attach a separate page.

VIII. Please indicate if you are interested in participating in any of the following special interest groups. (Check all that apply)
 Education and Consulting
 Graphics
 Information Systems
 Interactive Techniques
 Statistics
 Computer Performance Evaluation
 Econometrics, Time Series, Operations Research

Figure 1. Sample Survey Instrument

While all of the foregoing are not absolutely necessary, it cannot be stressed enough that with extensive preparation, the first meeting is far more likely to flow smoothly, and to establish your group in the eyes of the new members as a serious entity, fully capable of realizing their expectations. This is particularly important, since the quality of the first meeting is a major determinant of whether or not members will continue to attend.

THE FIRST MEETING

At this point, you have reached as many potential members as possible; reserved a site for the meeting; mailed an announcement of the first meeting to all potential members (including an agenda, directions and parking information); and confirmed by telephone their intent to attend. If you have also surveyed the backgrounds, interests and expectations of potential members, then profiles of individual members as well as of the group as a whole should be generated prior to the first meeting, for distribution to the membership at large.

Your own role in the first meeting could not be clearer. For even though you might not serve as host (if your company cannot provide the meeting facilities), you will most definitely chair the first meeting. Hence, despite the fact that you might not be a master of oratory, much less comfortable with the prospects of speaking before any group (however congenial), you must nevertheless be prepared to provide some introductory remarks, as well as to guide the group through the meeting's agenda.

The following is a sample agenda for your first meeting:

- Welcoming Remarks
- Distribution of Group and Member Profiles
- Introduction of Members
- Presentation of Survey Results
- Business Session
- Coffee Break
- Presentation(s)
- Adjournment

Obviously, there is nothing sacred about the order of items in the preceding sample agenda. It does represent, however, most of the key items which should be covered during the first meeting.

Welcoming Remarks

In terms of your introductory remarks, keep them informal and brief. You might want to limit your remarks to the salient experiences you encountered in starting the group, and to briefly review the agenda. Your message should essen-

tially be one of welcome, and should orient the membership to the fact they will be instrumental in defining the evolving structure of the group. As a rule of thumb, when in doubt, stick to the business at hand.

In group settings, individuals often manifest a relentless tendency to gravitate towards people whom they know. This herding instinct will be first and foremost reflected in the seating arrangements: members from the same company, for example, will tend to sit together. To facilitate group interaction further down the line, you might consider, during your opening remarks, asking the group to physically reconfigure themselves so that nobody is seated next to somebody they know. Since the ensuing shuffle can have a rather disruptive effect on the proceedings, it is strongly suggested that you do this as early in the meeting as possible.

Distribution of Group and Member Profiles

If you have prepared profiles for each member responding to your earlier survey, then complete sets of these profiles should be distributed to each member attending. This will allow members to review and correct their own profiles, and will provide each member with useful reference materials concerning other members. Individuals for whom no profile was generated should be given a copy of the survey instrument at this time.

Group profiles can be generated in many ways. Typically, separate lists of names and telephone numbers can be produced by such factors as company affiliation, by SAS product for members indicating extensive interest and/or proficiency, by operating system under which SAS is run, etc. Such group profiles will allow for a more efficient means of cross-referencing the individual member profiles, and can be instrumental in identifying special interest subgroups within the group. A single profile showing the percent distributions of responses to key factors in the member profiles might also be of interest to the group.

Information from the survey which pertains to the new group's organization and structure should not be included on the individual member profiles. Also, the presentation and discussion of these latter results should be deferred until later in the meeting.

Introduction of Members

The best way for you to introduce individual members to the group at large is to allow them to do the honors themselves. Typically, this proceeds in round-robin fashion until a point of completion is reached. While such introductions are without a doubt necessary, even the most rudimentary attributes of the individual members (i.e., their names) are rarely retained for more than a brief moment by the group at large. Above and beyond considerations of information overload, this is largely due to the fact that most members are distracted from listening by the compelling need to mentally compose their own introductions.

Although necessary, then, these formal introductions are rarely a sufficient means of acquainting members with each other. There are several steps that can be taken to further bolster the "name recognition" factor for each member. For example, if your seating arrangements allow (i.e., if tables are arranged in a rectangular or U-shaped fashion to allow for eye contact), then hand-printed name cards should be placed in front of each member (first names printed in large block letters are perfectly adequate, with company affiliation noted below in smaller print). Also, as chairperson of the meeting, you should make a point of addressing members by name each time they are recognized. If name cards are not feasible, then you might consider constructing a crude seating chart while the members are introducing themselves to the group.

Presentation of Survey Results

The survey results to be presented here should be limited to those items pertaining to the organization's structure and organization. Therefore, depending upon the specific questions asked in the survey instrument, this presentation might take the following form:

<u>Question</u>	<u># Yes</u>	<u># No</u>
1. Would you like the group to be chartered (dues, by-laws, officers, etc.)?	10	16
2. Should we meet during business hours?	22	4
3. Should we meet during the summer months?	10	16
4. Would you be willing to present a topic?	9	17
5. Would your company be willing to host a meeting?	22	4

Such a format, of course, can be modified to accommodate questions with more elaborate response categories--i.e., the frequency of meetings, the length of each meeting, etc. The important point is that the presentation of these results allows members to approach the business session with a fairly good idea of the group's initial position on these matters.

Business Session

The purpose of the business session is to tentatively resolve those questions pertaining to the organization and structure of the group. Ultimately, however, a consensus needs to be reached only with regard to the date of the next meeting, the site of the next meeting, and the topic(s) to be covered by the presentation(s). In the extreme, this last item can be left open, although it is not recommended that you do so.

Many of the issues here are highly interrelated. For example, if the group elects a formal organizational structure (chartered, with dues,

by-laws and officers), then the "what" aspect of the related question of leadership becomes merely a question of "whom." With an informal structure, however, the leadership question is slightly more complex. For example, a single coordinator might be elected for a fixed term. Or, each meeting might be chaired by a representative of the hosting company. In any event, responsibility for various "housekeeping" functions must eventually be delegated to specific individuals (i.e., maintenance of the member database, the presentation material file, etc.).

Two points bear noting here. First, the purpose of the business session is not to cast the group's structure in bronze, as it were. After operational considerations have been tended to, do not create structure where it is not needed. Indeed, the group should feel comfortable with the prospects of changing such factors as the frequency of meetings, etc. if conditions should warrant it at a later point in time.

Second, from your point of view (i.e., as the prime mover), the first meeting represents a transition from the SAS users group as your personal project to the SAS users group as a truly collective entity. Be graceful whenever circumstances call upon you to relinquish control.

Presentation(s)

It is the presentation(s), and not the organizational details, which will figure most prominently in each member's assessment of whether or not the new group merits their continued participation. Thus, for the first meeting you should select topics which: a) are general or novel enough to appeal to the broadest spectrum of members' interests; and b) presuppose a proficiency level consistent with that of the largest number of members. The section of the member profiles pertaining to the availability, usage, proficiency and interest for each SAS product should prove to be indispensable in this regard.

For the first meeting, then, you might want to consider topics such as the following:

- Suggested Guidelines for SAS Coding: Reducing Volume and Simplifying Structure.
- An Overview of Selected SUGI Supplemental Library Procedures and Functions.
- SAS Documentation: What the Current Manuals Don't Tell You.

A good strategy is to first select a general topic, and then ask three or four members to address certain aspects of that topic. This will require quite a bit of aggressive "selling" on your part, but in terms of the first presentations, keep in mind that it is ultimately a "you or them" situation. You should stress to potential presenters that you are not looking for an expert treatment of the topic. Rather, they should draw upon their own experiences with SAS, and present examples of some of their more creative or non-standard applications. Be advised,

however, that if you leave the matter of the first meeting's presentation(s) to the last minute, then in all likelihood you will be the sole presenter.

DECISIONS FACING THE GROUP

While the group is in its formative stages, several critical decisions must be made. For the most part, these pertain to the group's objectives, structure, leadership, meetings and administrative functions. Although some are obviously more important than others, and all are highly inter-related, each will be discussed separately.

Group Objectives

Initially, the short-term objectives of the group will center around getting organized and maintaining some semblance of normal operations. For the long-term, however, some consensus must be reached about the role members expect the group to play. For example, a passive role might be preferred, in which the group simply provides a structured context in which members can periodically meet and share experiences. On the other hand, there might be greater interest in the group playing a more proactive role in identifying members' needs and taking steps to meet them (by way of training workshops, special projects, seminars, etc.). Obviously, in order to be realistic, the group's objectives must be consistent with the role the members expect the group to play in the long run.

Meetings

Decisions pertaining to the meetings themselves center around considerations of frequency, length and time. Some groups meet quarterly, some monthly, some bi-monthly, etc. While each has its own distinct advantages and disadvantages, as a general rule monthly meetings are more suitable for groups with a large and highly diverse membership and a strong, well-structured leadership. Less-frequent meetings are indicated for smaller groups, or those which are more homogeneous in terms of members' backgrounds. Regardless of the initial decision regarding the frequency of meetings, the issue should be raised again after the new group becomes more settled.

Mid-afternoon meetings during the middle of the week seem to pose the fewest conflicts for members. Also, 3-4 hours would appear to be an optimal length for meetings. However, there is no reason that the time and length of each meeting be the same, although this tends to be standard practice.

Group Structure

The question of whether a group's structure should be formal (i.e., chartered, with dues, by-laws, etc.) or informal initially depends largely upon the disposition of the members. Some prefer rigid structure as a matter of

course, while others view it as being unnecessary and restrictive. Two other factors which might influence the structure of the group, however, are the size and diversity of its membership. For example, an informal structure might prove to be problematic for larger groups, or groups with a more complex organization (i.e., with a proliferation of special-topic subgroups). For smaller groups with a more homogeneous membership, however, an informal structure is perhaps more suitable.

Group Leadership

The leadership of an emerging SAS users group can be roughly classified as being either ad-hoc or fixed term. Ad-hoc leaders usually serve on a voluntary and rotating basis, such as when a representative of the company hosting a meeting presides over the preparations as well as the meeting itself. Fixed-term leaders (coordinators, executive or steering committees, officers, etc.) provide more continuity, and are usually elected or appointed for a predetermined period of time. The two leadership options, incidentally, are not mutually exclusive.

An ad-hoc leadership structure is strongly recommended for the first few meetings, until the members become better acquainted both with each other, and with the needs of the group. In most cases, a steering/executive committee is formed within the group's first year, as the needs for continuity of leadership increase.

Administrative Functions

Even more pressing than the question of group leadership is that of responsibility for administrative functions. Briefly, these include such details as recordkeeping, mailings, maintenance of the member data base and presentation material files, etc. Some of these functions can be easily rotated, such as mailings and minutes. Others, such as data base maintenance, record-keeping and files must usually be handled by the same person(s) from meeting to meeting. Responsibility for the handling of each of these administrative functions should be delegated as early as possible.

SUBSEQUENT MEETINGS

After the group becomes more or less settled, some care should be exercised to insure that it doesn't become too settled. For example, numerous options exist for maintaining members' interest and for increasing the effectiveness of the group in meeting its objectives. These include the varying of presentation formats for meetings, the formation of special-topic subgroups, as well as organizing workshops and hosting social events.

Varying Presentation Formats

A "traditional" presentation format usually involves a rather formal treatment of a predetermined topic by a single speaker, followed by a brief (and often constrained) discussion

period. Depending upon the topic and the speaker, this can be a remarkably effective means of covering a given subject area. Over time, however, there are several problems with this approach. First, it can be rather intimidating to potential presenters. Second, it tends to condition the group to assume a non-participatory role. And third, the scope of such presentations is often limited to the extent to which the speaker's perspective prevails.

Possible alternatives include the use of a structured panel discussion or seminar format, in which several individuals present various aspects of the same general topic. Depending upon the group, the number of presenters can be varied, along with the degree of formality. Ultimately, the goal should be to maximize group participation, as well as to broaden exposure to the subject matter.

The content and scope of presentations can also be varied for greater effect. For example, for some subjects (i.e., graphics), it might be desirable to go beyond particular aspects of SAS/GRAPH and include a treatment of general graphics principles, hardware considerations, etc.

Finally, the orientation of presentations should be varied, so that a good mix between technically-oriented (e.g., various uses of the INFIL statement) and application-based (e.g., using SAS to automate information center administrative functions) can be achieved.

Special-Topic Subgroups

Rather than try to make a single group be all things to many people, in some instances it is a good idea to form distinct special-topic subgroups. These can be based either on function (e.g., training and education or installation and maintenance), or can be organized around a single SAS product (e.g., ETS or CPE). This is particularly appropriate when enough members' interests and use of SAS are highly concentrated in one area, and cannot be addressed by the larger group to their satisfaction.

Organizing Workshops

From time to time, workshops can be conducted in lieu of regular presentations. Whether these involve training sessions for members, demonstrations of new products by vendors, or the evaluation of various software tools, each represents an opportunity for the group to remain responsive to members' interests and needs.

Social Events

Prior to the formation of the Hartford SAS users group, most potential members expressed a strong interest in meeting and interacting with other SAS users. For many, however, it can be difficult to get to know other members during regular meetings. Hence, as the group matures, it might be desirable to plan a few meetings which are

largely social in nature. For example, an evening meeting with a cocktail hour and dinner prior to a presentation might be scheduled once or twice a year.

OTHER CONSIDERATIONS

Before concluding, several miscellaneous considerations will be briefly introduced. These include various means of facilitating group interaction, the issue of operating expenses and the possibilities for collaborating with other users groups.

Facilitating Group Interaction

Unfortunately, well-balanced and constructive group interaction is not a phenomenon which can be counted upon to spontaneously emerge when needed. Since it is critical to the effectiveness of the SAS users group, however, reasonable efforts should be made to facilitate this interaction whenever possible.

These efforts can take several forms. First, there are physical factors to be considered, including the meeting room size and the seating configuration. Essentially, room capacity should not significantly exceed the number of members in attendance, as this has an inhibiting effect. Also, auditorium-style seating arrangements should be avoided. Rather, any configuration which allows for eye contact among the members is ideal.

In terms of contextual factors, an informal atmosphere is far more conducive to discussion than a formal atmosphere. Also, it helps if adequate opportunities for social interaction are provided. Stated differently, it doesn't always pay to skimp on the coffee breaks when time is limited.

Finally, there are various techniques which by their very nature foster group interaction. For example, structured brainstorming techniques (e.g., Nominal Group Technique sessions) are particularly useful during the first meetings, insofar as they serve the additional purpose of identifying and assigning priorities to possible presentation topics. If the group is large, the use of small discussion groups helps to mediate the tendency of members to direct their comments to the leader only.

Operating Expenses

Initially, the expenses incurred in operating a local SAS users group are usually offset by in-kind contributions from the members' companies (e.g., provision of meeting facilities, refreshments, use of company mail facilities, etc.). If this is not the case, then costs must be recovered either as they are incurred (e.g., through charging a fee for attendance), or by generating revenue, either through dues, fund-raising activities, or the provision of services for a fee (training seminars, etc.). As the group becomes more ambitious in its undertak-

ings, the question of offsetting expenses can be expected to figure more prominently.

Joint Ventures

The potential for collaborating with other groups (whether companies, user groups, the SAS Institute, etc.) should not be overlooked as the group develops. For example, economies of scale can be realized if the group engages a consulting or educational firm to conduct training courses for which members' companies could be charged on a proportional basis. Also, a regional meeting of several local SAS users groups could be organized, similar to SUGI but on a smaller scale. Finally, the group could serve as an informal liason between local users and the SAS Institute, in terms of communicating concerns, questions and unresolved needs in a more structured fashion.

SUMMARY

Given the diverse nature of members' needs and backgrounds, the structure and orientation of emerging local SAS users groups can be expected to differ considerably. However, the issues and guidelines presented in the previous sections are relevant, to varying degrees, to all new user groups, and should help a new group to avoid undue floundering during its formative stages.

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