

# Care and Feeding of Healthy SAS User Groups

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## Abstract

Regional and local SAS users groups create obvious benefits for members, including education, networking, and career opportunities. Organizers and sponsors of users groups also receive benefits, including leadership opportunities; experience with event planning, financing, and logistics; and indirect influence on local and regional economic development. This paper will describe lessons learned from one person's broad exposure to and experience with local and regional SAS users groups. Specific attention is devoted to the core competencies of a user group's leadership.

## Introduction

Starting and growing a user group is an exciting and challenging affair that draws on its leaders' energy and requires balance among a variety of core competencies. These include vision, leadership, commitment, planning, communication, recruiting and promotion, member focus, and professional representation in legal, liability and financial affairs.

## Vision

When confronted with the term "vision," most folks sardonically recall strategic brainstorming sessions where a "Mission/Vision/Values" statement is painfully drafted and then seemingly (and quickly) discarded. I believe that vision statements are at their best when crafted as a living, breathing statement of purpose and philosophy that evolves and changes along with the organization. My experience with successful user groups suggests that user groups are in many ways similar to for-profit corporate settings, but exhibit significant differences in the area of personal motivation and member benefits. The notion of the "learning organization" applies very well to user groups, and this issue will be explored further.

## Purpose & Values

One of the first things that a fledgling user group ought to consider is drafting a statement of purpose and values. This also applies to existing groups who are facing a new and uncertain environment, such as a dramatic turnover in leadership. Whatever statement of purpose is drafted, it is

critical to reach mutual agreement on the core values that will drive the group's policies and activities.

User groups focus on a variety of issues when crafting their vision statement. These include:

- Education and training
- Professional and social networking
- Promoting local economic development
- Promoting SAS® software
- Financial and membership size (large, small)
- Desired level of formality

## Mission

Once the vision of the user group is determined, the mission becomes easier to define. A typical mission statement spells out where the group is starting from, where they want to go, how long will it take to get there, and what must they achieve along the way to meet their ultimate objectives.

## Management

Most user group leaders probably think of the company that employs them and their user group as distinctly different organizations. Nonetheless, my experience with user groups leads me to believe that time-tested principles of organizational management appear to work equally well in both settings.

Consider that user groups consist of familiar, less formally defined components of the traditional North American organizational structure: planning, finance, marketing & advertising, human resources, operations, distribution, and communications.

Similarly, contemporary management issues are just as relevant to user group leaders: attracting top performers, delivering high quality products and services, knowing the customer, and managing costs effectively.

The biggest difference between a traditional corporation and a user group is that all of its leaders and contributors are volunteers. This has a dramatic impact on managing the motivation of user group “employees.” Less tangible yet sizable factors have replaced the traditional incentives of salaries and benefits:

- Networking opportunities
- Contribution to community
- Ego gratification
- Personal exposure to the market
- Self-improvement
- Career development

Understanding these motivating factors and looking for ways to capitalize on them will help user group leaders in keeping their groups motivated and performing at high levels of effectiveness.

Since motivation is central to successful management of volunteer organizations, it is appropriate to review several generally accepted findings from the field of work motivation (Landy, 1989). These findings provide guidance to leaders for maximizing volunteer motivation:

- Leaders should link rewards to good performance to whatever extent possible
- Leaders should set goals (mutually with contributors if possible) to ensure equitable and objective performance evaluation
- Leaders should take steps to increase the feelings of personal efficacy (i.e., effectiveness and preparedness) of volunteers about their work
- Individuals should receive accurate and timely feedback
- Leaders should avoid conditioning volunteers via negative reinforcement, since performance is less predictable than when positive rewards are employed

### **Learning organizations**

Charles Handy, in “Managing the Dream,” (Handy, 1995) observes that today’s organizations are facing uncertain environments characterized by rapid, discontinuous change. In order to cope and survive, Handy prescribes a regimen of continuous renewal, reinvention, and reinvigoration. This notion is widely referred to as the “learning organization.”

The learning organization is built upon an assumption of competence that is supported by four other qualities: curiosity, forgiveness, trust, and togetherness. Curiosity provides the possibility to experiment, bounded by each individual’s authority in the organization. This is paired with forgiveness for failed experiments. This pairing cannot flourish unless there is trust facilitated through togetherness—such as that developed through teamwork. Handy observes that “Lonely leaders are often slow and poor learners, whereas people who collaborate learn from each other and create synergy.”

An important implication of the learning organization’s environment of trust and togetherness applies to the way power is distributed. In this environment, power resides at the edge of the organization, in the individuals interacting with the nuts and bolts of daily operations. The implication is authority must be earned from (not imposed upon) those over whom it is exercised. This implication seems especially critical in volunteer organizations like the user group, where there are no controls in place to slow the exit of disaffected contributors.

What is the source of organizational cohesion in this environment? The learning organization is held together by shared beliefs and values, by people who are committed to each other and to common goals—a rather tenuous method of control, states Handy. Again, this lends support to the need for mutual acceptance of the user group’s value statement.

Handy offers the following specific options to leaders of a learning organization to help “keep the wheel moving”:

- *Subsidiarity*: Give away power to those closest to the action.
- *Horizontal career paths*: Rotate people through the organization in a variety of jobs to provide them with broader experience and a sense of growth and accomplishment.
- *Personal example*: Leaders should provide a personal example to others in the organization, exhibiting the following behavior: open-minded, questions himself and others, ready to take risks, listens to criticism and advice, and has a purpose beyond himself combined with an awareness that he cannot do it on his own.

An example of subsidiarity implemented in our own regional user group is the way conference section co-chairs are given the rights to decide between themselves how to manage the tasks for which they are jointly responsible. Rather than the conference chair determining strict policies and then bearing the burden of monitoring and enforcement, section chairs are evaluated on whether the ultimate objective (timely and effective management of the presentations and equipment) is accomplished.

## Leadership

Notions of effective leadership abound in both popular theory and academic or research-based theory. I've sampled from both arenas in order to discuss user group leadership.

### **Popular theory**

There have probably been as many ideas about effective leadership as there have been leaders. I've selected my favorites in an effort to characterize the attributes and behaviors of effective leaders in the following (incomplete) list:

- Effective leaders have the experience base to slice through overly complex, time-consuming issues because they have developed a knack for knowing what matters and what doesn't.
- Leaders understand the power of delegation as the remedy for limited personal time and resources. Part of the process that leads to comfort in delegating is learning to let others tackle a task that they might not be able to solve as quickly or elegantly as you might yourself. This trait seems to be particularly common among technical professionals like programmers and systems analysts, who take justifiable pride in their ability to understand and solve complex problems.
- Listening and asking questions is a key to effective leadership. Even the best leaders don't have all the answers, and new solutions to old problems often spring from the intellects of individuals with lesser experience.
- Great leaders intuit the right moment to re-enter the discussion and offer guidance, without constraining new ideas and without forcing an immature conclusion.
- Effective leaders also exhibit a bias for action, having the greatest impact in situations where further study is not likely to shed any more light on the best alternative among the feasible set.

### **Research-based theory**

Academic researchers have also amassed a wealth of knowledge about leadership and the forces that shape leader roles. Three areas of research that seem particularly relevant to volunteer organizations are concerned with the sources of and factors affecting the leader's role in the organization.

## French & Raven on types of power

The first research issue is concerned with distinguishing the kinds of power that are manifest in organizational settings. French and Raven (1959) proposed that leaders have available to them five different types of power:

- Reward power (the potential of a supervisor to mediate or dispense rewards to a subordinate)
- Coercive power (the potential of a supervisor to mediate or dispense rewards to a subordinate)
- Legitimate power (the right of a supervisor to influence a subordinate and the obligation of that subordinate to accept that influence, such as the "consent of the governed")
- Referent power (the subordinate accepts the leader's goals as his own, and identifies with the leader in the pursuit of those goals)
- Expert power (the knowledge or expertise that a supervisor has in a special area)

I believe the first three types of power are weak or absent in the volunteer organization setting. Even user group presidents, who might possibly wield some legitimate power in extreme cases, probably can't rely on that power alone in contentious situations.

In contrast, I believe referent power and expert power have strong effects in user groups. The intelligence and experience of user group leaders, particularly when combined with positive traits such as "likable" and "trustworthy" will readily attract power through both referent and expert channels. It is important to note here that expert power to lead an organization like a user group does not necessarily rise from expertise in a relatively unrelated technical skill like SAS programming—the two might be present in the same individual, but it is not presumed.

## Hollander's social exchange theory of leadership

The second theory area has implications consistent with those of the learning organization. Hollander's (1978) social exchange theory of leadership proposes that leaders change or maintain their behavior to conform to the expectations of subordinates—because the leader needs certain things from the group. This might include loyalty, energy expenditure, and praise. On the flip side, the group accepts or rejects the behavior of the leader according to expectations, anticipated rewards, and likelihood of goal attainment. The relationship between leader and group is based on an equitable exchange of effort and contribution.

I have witnessed user group situations where the leaders bore on their backs nearly the entire weight of meetings and conferences, and other situations where leaders completely failed to deliver on the expectations of their group. In my experience, these violations of equitable exchange between leader and group culminated in an environment characterized by confusion, guilt, anger, frustration, and ultimately regret and severed relationships. While Hollander's theory is fairly new, there is certainly anecdotal support for it in these user group experiences.

## Kerr and Jermier on leadership substitutes and neutralizers

There are certainly instances of groups who seem to buck the trend. There are leaderless groups that perform effectively. Other groups with leaders who would seem otherwise very effective seem not able to make use of their talents. Kerr and Jermier (1978) characterized two different sets of variables to account for these events. Leadership substitutes make leadership unnecessary or redundant; neutralizers prevent a leader from acting in desirable ways. A shorthand for these variables is "self-motivators" for substitutes and "de-motivators" for neutralizers. The following lists will make it abundantly clear to user groups if additional factors are at play in their leadership structure.

### Leadership substitutes (self-motivators)

- Experience, ability, training
- "Professional" orientation
- Structured, routine, unambiguous tasks
- Task feedback
- Intrinsically satisfying tasks
- Cohesive work groups
- Formalization (explicit plans, goals, areas of responsibility)

### Leadership neutralizers (de-motivators)

- Indifference toward rewards offered by organization
- Low position power (leader lacks control over organizational rewards)
- Inflexibility (rigid, unyielding rules and procedures)
- Leader located apart from subordinates with only limited communication possible

## Commitment

Launching a group will be easier if a core group of leaders is dedicated to a medium-length term of office (e.g., three to five years). This core group will sustain commitment to the group's vision statement and maintain momentum in the group's activities.

My best example of commitment is an individual who was the chair of a young but thriving local SAS user group for several years. This person's commitment to the group was evident in the continual stream of newsletters and regular group meetings. The consistency in the group's activities was something the members could count on and consequently make room in their busy schedules.

Commitment to the organization can be built into the design through succession planning. This is sometimes part of the bylaws for larger user groups. Having an explicit plan for how leaders move through the official positions in the group will clarify the level of commitment expected of each leader. A succession plan also designates who is expected to fill the shoes of an individual who (for whatever reason) has to leave the organization before their term expires. Finally, these plans bring into focus the need to regularly recruit fresh candidates for junior leadership positions.

## Planning

Competent planning is a critically important skill. Planning makes it possible to coordinate the several resources that contribute to a successful user group activity, and enables groups to adapt their plans to changing resource availability. Fortunately planning is also one of the easiest skills to develop, due to the abundance of training courses and project management software in the market today.

Briefly, then, good planning breaks down group goals into a hierarchy of objectives, strategies, and activities. Each activity consists of several planning components: timelines (and lead times), deliverables, resources and

their accountabilities, and identification of the critical path.

The capstone of good planning is communication to the various parties involved in user group activities, as described in the next section.

## Communication

A user group's communication activities involve several different constituencies. Members of the user group are usually the primary constituency. However, representatives of other user groups (local, regional, international, and perhaps other local computing interest groups) provide very useful feedback on ideas that worked well for them in their activities. Communication with other groups is also necessary to coordinate common resources, and possibly can lead to collaborative bargaining with vendors.

This brings us to the most diverse category of constituencies: trade allies. These include SAS Institute itself, SAS Quality Partners, hotels, conference and meeting room facilities, printers, entertainers, caterers, shippers, and in special instances the government (particularly Customs officers when meetings take place across international boundaries, as occurs in the Pacific Northwest). Specific and customized communications materials are often required for trade allies. Since both sides of the conversation are generally getting something out of the deal, these communications tend to take the format of negotiation rather than confrontation.

*Soapbox commentary:* User groups tend to have well-defined views about the role of SAS consultants and vendors as part of the user group community. Often, specified policies and procedures have been written to limit the involvement of vendors in user community events, with the presumed intent to prevent over-commercialization of these activities. While the intent may be sound, I believe the implementation can go too far by creating a sour and tenuous relationship between the vendor and user group leadership. Furthermore, these policies tend to deny the vital role that vendors and consultants play in the market as channel partners (officially designated or not) for SAS Institute and user groups. *End of digression.*

## Recruiting and promotion

While not obvious, recruiting and promotion (in a word, salesmanship) is an essential core competency of user group leadership. This becomes clearer when considering user group conferences: Conference chairs need to recruit section chairs and a planning committee. Section chairs need to recruit paper presenters. Everyone needs to recruit registrants.

I've found to my relief that these sales efforts need not be self-aggrandizing. Instead, I find it exciting and fun to help fill a need or desire on the part of user group members and helpers.

Promotions in particular help create a mood of excitement around an activity that may have grown tired or worn. Remember that the magic words associated with the highest-performing promotions are (as they always have been) "Free!" and "New!" At the least, promotions generate an attitude change in their audience, and at best they spur an actual behavior change that impels the audience to action.

Identifying individual needs and desires that make for successful recruiting and promotions efforts is made possible by organizing around a focus on customers (i.e., user group members), as described in the next section.

## Customer focus

Members are the first customers of a user group. How can leaders of a user group keep conferences stimulating and attendance thriving if they don't know which issues their members find interesting and meaningful? Consequently there is a need for actively gathering and understanding customer needs—hence the growing popularity of business terminology like "voice of the customer." User groups, like marketing organizations, stay in touch and remain vital by literally seeking out customer feedback and eliciting met and unmet customer needs.

Some very basic market research techniques are available, often at low cost, for assessing customer needs and building a customer focus. Most people think of telephone and mail-based surveys. The SASware Ballot is a well-known example of mail survey of SAS software users. However, these surveys tend to be more expensive and time-consuming, and if poorly designed they may actually deliver feedback that is not actionable or meaningful to user group leaders.

Telephone interviews with relatively small groups of opinion leaders and key informants are an inexpensive, rapid way of assessing the needs of the broader user community. These qualitative techniques are not statistically projectable like quantitative techniques, but they often return richer descriptive information. This kind of information is especially useful for a user group that is just getting started in developing a customer focus. The Pacific Northwest regional group has started to use the key informant interview technique for guiding its conference program selection.

## Legal, liability and financial representation

This is the least fun of all the core competencies, and sometimes seems like the most expense for the least outcome. However, proper legal, insurance, and financial representation maintains the user group's collective investment in their organization and protects it against uncertainties.

Furthermore, SAS Institute has indicated it will require regional SAS user groups to be incorporated in order to receive Institute support at regional user conferences, beginning on or about January 1, 1999. SAS Institute is also considering a requirement of an annual statement acknowledging that appropriate taxes have been paid and that the group has appropriate liability insurance covering its event.

One regional user group's experience (Ray Pass, personal conversation, 9/25/97) with this process found the cost of legal support for incorporation just above \$1,000, and the cost of retaining an accountant in the mid-four figures. Cost of event insurance depends on geographic location, and can range from a few hundred dollars to just under four figures for one year's coverage.

## Conclusions

There are many factors that contribute to the success of a user group. This paper has illustrated the ones that I've found to be the most pivotal. A great deal of attention is given to vision and leadership, as these two issues provide the foundation for everything else (with a little theory thrown in for flavor). Writing this paper also made me think critically about the user group that I serve and ways we can improve service to our members. I look forward to hearing from other group leaders for competencies I've overlooked, and for stories that support the ones I've discussed at length.

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