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'99 SOA survey
Future can rise from platform of solid member support

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SOA members have a strong relationship with their organization, an important factor as the SOA plans for its future, says the report of the latest membership survey.

Conducted in July and August 1999, the survey asked 35 questions of 404 randomly chosen members. Questions addressed member demographics, SOA information and education delivery systems, SOA research, SOA practice areas and Sections, and expansion of the profession.

The membership is surveyed periodically to help the SOA leadership stay in touch with members' needs and interests and determine how the Society can best serve its members in the years ahead. A similar survey was done in 1996, as well as in earlier years.

Overall, the 1999 survey showed strong, positive links between members and the organization, noted survey designer Philip G. Kuehl, Ph.D., of Westat, Inc.

- Members stay with the SOA for long periods of time.
- They get and remain involved through committees, research projects, or meetings and seminars.
- Their employers often support their membership and involvement.
- Members decide to attend meetings based on the content's relevance to their professional concerns.

"The SOA is planning for its future from a position of overall strength in terms of its relationship with current members," Dr. Kuehl said in his report. Central to this relationship are: SOA members view the organization as "a core element" in their careers and professional development, and they can participate frequently in Society programs. This implies "the SOA can continue to be a 'best-in-class'

membership organization if it provides innovative and relevant content through its programs and services," the report said.

The Web-enhanced future
How will members define excellence for the SOA in the years ahead?

One way will be the existence of more online functions. "Virtually all SOA members are computer users who have Internet [and e-mail] access," the report noted. (Among respondents, 98% said they had both Internet and e-mail access.) This, among other factors, led Dr. Kuehl to observe in his report that the SOA is positioned to successfully deploy information technology applications "in virtually all information, education, and administrative functions."

The SOA's Web site, which has been visited by a large portion of members, can be central to strategies "to produce

high quality member benefits" if it's made "fully functional," said the report. (Of the respondents, 82% said they had visited the site.)

In the area of information services, the report looked at members' views of the various SOA publications. The table below summarizes members' preferences for the delivery of SOA publications.

Many of the 1999 survey report's recommendations for moving SOA publications online already have been implemented as a result of feedback from a 1996 survey. Currently on the SOA Web site are *The Actuary*, *The Future Actuary*, the *Record*, the *Yearbook*, the *Directory*, specialty guides, most Section newsletters, and abstracts of major articles in the *North American Actuarial Journal*. Experience studies are also published online as they are completed.

In other questions about information

Members' Preferences for Publications Delivery

SOA Publications	Print Only	Electronic Only	Both Media	No Opinion
Transactions Reports	15%	47%	38%	1%
The Actuary	31	30	37	1
Actuarial Clearinghouse *) t ct ds upo c dbupo u of fgff e bf t*	10	59	20	11
Section newsletters	20	37	42	1
Directory of Actuarial Memberships..........	13	43	44	0
Yearbook..	21	44	33	2
Specialty Guides *) dpoub o oh sbdufi bf b cc phsb i f t*	11	59	25	6
Monographs...	13	47	27	12
North American Actuarial Journal.............	17	37	28	19

services, members' responses in 1999 indicated:

- Banner ads should be allowed (75% of the 98% of respondents with e-mail access).
- The *Directory* should remain online; download access should be limited (57% for both).
- The development of an on-line SOA library should continue in light of members' enthusiasm for the Web, as indicated by the number of members with Internet and e-mail access, the number visiting the SOA Web site, and general requests for more information online.

In addition to information services, other activities should be increasingly available through the Web, responses showed. These are:

- Voting in SOA elections (85% of those with Internet access)
- Registration for meetings and seminars (87%)
- Purchase of publications and study notes (78%)
- Participation in member discussion forums (77%)
- Registration for exams (61%)

Members said "no" to only one of the six functions suggested, paying SOA dues (20%).

Continuing education

Responses to questions about continuing education gave some indication of what members will view as excellence in this area in the future.

A near majority of respondents (49%) voiced support for developing an on-line university, which already has begun. Once completed, the Web-based learning center would be used by many members (40%) in combination with traditional meetings and seminars. Twenty-one percent said they would use on-line learning more frequently, and 33% said they would more often attend traditional meetings and seminars.

The most appealing courses for an on-line university, respondents said, would be in new and emerging topics (91%), basic practice (81%), practice-area cross training (79%), and management and business topics (69%).

Regarding continuing education in general, survey respondents said they will seek practice area education more often than general management courses in the years ahead (56% for practice area, 19% for general management, 22% for both).

The path to excellence

The survey pointed to several implications for future SOA initiatives.

Taken together, all the data on member interest and capabilities in using the Web and e-mail "suggest that the SOA can successfully pursue … a 'virtual association' concept" in information and education, the report said. Central to that is the "full functionality of the Web site."

Respondents' answers to questions about expansion of the profession indicated members would support programs related to two major initiatives:

- Building awareness of the roles and skills that practicing actuaries have in private sector organizations (64% of respondents)
- Developing nontraditional areas of practice (58%)

Many respondents said they would even be willing to pay a dues surcharge to help fund these efforts. Of those who said building awareness should be a priority, 77% said they would pay a surcharge. Among those supporting nontraditional practice development, 76% said "yes" to a surcharge.

Room for improvement

The survey showed two areas for improvement, either by increasing members' awareness of existing value or by making changes to those areas. Both SOA research and practice areas/special interest Sections were rated average in effectiveness by respondents.

The research area's average score may stem from lack of awareness, Dr. Kuehl's report said. Only a slight majority, 53%, said they were somewhat or very familiar with the SOA's research efforts. The same percentage said SOA research ranked average in its value to members, while 24% gave it a high-value rating and 22% rated it low. Also, respondents clearly prefer practical research to theoretical research (70% vs. 30%). Equally important, survey responses indicated dissemination of research must be "highly timely and relevant to (members') practice areas," Dr. Kuehl's report noted.

Regarding the SOA's practice area structure, 61% of respondents rated it average in effectively meeting their needs, while 26% gave it a high ranking and 9% a low rating. Sections received an "average" score from 59% of respondents, while 26% rated them highly and 11% said they were low in effectiveness. According to Dr. Kuehl, these results imply that both practice areas and Sections would benefit from business plans that:

- Identify and prioritize members' needs to be addressed through practice areas and Sections
- Develop governance processes to identify leaders and encourage member involvement
- Recognize the need for strong staff leadership, support, and management
- Assure adequate funding

Next steps

The survey's findings send some clear signals about approaches to developing new and better programs and improving current ones.

Senior SOA leadership has asked the SOA's managing directors to carefully review the survey's results and formulate ideas for presentation to the SOA officers and committee chairs. The four managing directors are Jeff Allen, practice area education and research; Linda Delgadillo, membership and marketing services; Marta Holmberg, core studies and global initiatives; and Kevin O'Brien, operations.

View the survey

The survey's results are posted on the SOA Web site (*www.soa.org*). Questions about the survey may be directed to Linda Delgadillo at the SOA office (phone: 847/706-3560; fax: 847/706-3599; e-mail: *ldelgadillo @soa.org*).