The Philadelphia Story (Or the LUG at the RUG)
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ABSTRACT

PhilaSUG (the Philadelphia Area SAS Users Group) has been called the best local user group in the most successful regional user group. This is most flattering, but we'll settle for being in the 95th percentile. Attendance at one time of 75 to 150 members at each of our three-times yearly meetings certainly suggests that we are doing something right.

Is it our location (in the City of Brotherly Love, fourth largest media market in the nation, of Rocky and Ben, home of the Iggles and the Broad Street Bullies), the quality of our meeting speakers and topics, of our additional program components (web site, newsletter, e-newsletter, low annual dues, the gourmet lunches, or the dedication of our volunteers? And what doesn’t work as well for us, what are our challenges and the issues that keep our President up at night?

We will share with you our successes and failures and hope to both offer you insight as well as an opportunity for you to help contribute to our continued success.

INTRODUCTION

When PhilaSUG came into being these many years ago, the primary goal, as today, was to serve as a venue for sharing information and offering networking opportunities to like-minded SAS® users in the greater Philadelphia area. We achieve this through our thrice-yearly General Meetings, the newsletter associated with each of these meetings, and a very robust web site.

But these do not spring from thin air. The supporting activities, our ties to SAS, NESUG, and other area Local User Groups (or LUGs) are part-and-parcel of our success. We will detail these and offer some of the thinking behind our choices to pursue our program in its current format. We will include selected examples of our web site, supporting information from SAS, and our forms in the Appendices.

GENERAL MEETINGS

These are scheduled three times per year. Afternoon half-day sessions allow us time for three to five presentations, open forums for announcements, introductions, welcome by the host, and breaks for refreshments and networking. Topics include the standard range of SAS presentations, many from speakers also presenting at SGF and regional and local user group meetings. We also usually manage to add one to three posters. These meetings come about from careful planning, a good location, and an agenda that continues to draw an enthusiastic audience.

Planning

Each general meeting is preceded by at least one face-to-face executive committee meeting, typically 8-10 weeks out. The need for a second executive committee meeting depends on how much work remains outstanding. Over time, our other tool sets have made the first meeting more productive, and any additional work has been accomplished via phone and/or e-mail, with the two meeting liaisons continuing to communicate with the host, PhilaSUG President, Web Master/Newsletter editor, and poster liaison.

At these meetings abstracts are reviewed, a tentative agenda is set, meeting liaisons (one for host/site, the other for papers) are chosen, and tentative scheduling for subsequent meetings are put into place.
Volunteers for the General Meeting and any additional responsibilities are identified and assigned to appropriate individuals. Not the least of this is assuring that the registration table will be covered and that The Box containing meeting supplies is filled and will be present at meeting set up time.

Location
Location of meetings is fundamentally tied to the availability of companies in our area who are willing to volunteer to serve as host sites. Negotiations may begin as much as two years in advance, and we continually indicate our interest in recruiting new sites. Site visits often follow to confirm that the location is reasonably accessible, that auditorium space and audio-visual support are sufficient, that provisions for registration and display tables, for refreshments, and for posters are available. Finally, the logistics of parking and of providing refreshments at breaks must be determined. We are fortunate in that there is sufficient concentration of SAS programming activity in our area to provide a steady stream of both companies wishing to host our meetings and of attendees.

Agenda
We are somewhat limited by who will volunteer to present at our meetings, but also will recruit additional papers as we feel necessary. This task is made easier by the large number of experienced SAS presenters living in the greater Philadelphia area, many of them well-respected at SUGI/SGF, NESUG, and PharmaSUG.

Our goal each time is to provide a range of topics from beginner and Base SAS® to advanced topics. Understanding that likely half of all attendees are first-time attendees, offering some of the classic Base SAS papers is never a mistake, even if executive committee members have heard or presented these themselves on many prior occasions. Advanced topics tend to draw more limited, if more intense audiences. When possible, we look to supplement any holes in the presentation agenda with our poster offerings.

SUPPORTING ACTIVITIES
A series of other, on-going or directly meeting-related activities go on which contribute fundamentally to the success of the General Meetings.

SAS
In a fundamental sense, it all starts with SAS and our charter from the Institute. (Please see Appendix A.) The support from our friends in Cary, NC include advertising our organization and any upcoming meetings on their web site, participating in the once-yearly SAS speaker sharing program, the once-yearly SAS publications discount program (usually partnering with the local SAS office around publications and training), giveaways, along with additional evolving set of benefits. Interaction with other organizations, whether NESUG, other LUGs, or the cross-pollination from those in PhilaSUG being active in these other organizations as well is fundamental to our growing as an organization and to maintaining contacts of value to our own programs, even if less systematic than our interaction with SAS.

Newsletter
The meeting newsletter specifically announces an upcoming meeting, but also offers a vehicle for general communication regarding the SAS community. The newsletter from a recent meeting can be viewed at:

http://www.philasug.org/2010_10_Fall_Newsletter.pdf

Standard contents include the agenda for our upcoming meeting, any instructions regarding pre-registration (for preparing visitor badges or for an informal head count for ordering refreshments), in winter our inclement weather procedures, map and directions to the host site, and any other topics of interest for the SAS community as space permits.
We once had some sense that a physical newsletter distributed via surface mail boosts our attendance over that generated solely by an e-announcement. Logistics for hard-copy require additional lead time to allow for printing, collating, addressing, and stamping of copies. The growing costs, tight calendars for production and distribution, and an increasingly-connected audience has since argued for solely relying on electronic distribution of this document.

**PhilaSUG Web site - www.PhilaSUG.org**
The PhilaSUG web site highlights upcoming meetings but also provides a more general and extraordinarily robust channel for communicating to the SAS community. (Please see our home page in Appendix B.) This boosts our visibility world-wide and makes possible sharing of general interest information (upcoming SAS local, regional, and national conferences, area SAS training, programming tips and techniques, SAS professional advancement opportunities, and the like) in a way readily accessible to a broad community.

We also use the web site for specialized functions such as continuously recruiting host sites (see Appendix C) and speakers and collecting prospective abstracts for review. (A recent table of contents may be viewed in Appendix D.) Executive committee forms and checklists only visible to committee members are stored here (please see Appendix E for list, Appendices F for Presenter Thank You Letter and G for a portion of the General Meeting Check List).

Additional e-tools include PhilaSUG-L, a low volume list serve used for announcing and meeting reminders, and the set of standard Philasug.org e-mail addresses (President, Secretary, Webmaster, etc.) which can be pointed to the preferred actual e-mail address of whomever is the incumbent in the position.

**Forms, Check Lists, and Form Letters**
Alluded to above, these capture the accumulated experience of our many programs. Incremental evolution and improvement keep these current and allow us to build structure around our programs, to build on past experience, and reduce the need to re-inventing the wheel with each new activity. First-time participants in the planning and organization of our meetings can be immediately polished and productive, allowing for more effective sharing of tasks. These forms especially are fundamental to the smooth execution of the roles of speaker and site liaisons for our general meetings.

**Simplification and Distribution of Tasks**
We fundamentally rely on volunteers: to organize our meetings, to perform the other supporting activities, to present at General Meetings, and to host these meetings. Is burnout a challenge, when does a program become too ambitious, what is “enough” people to comprise the executive committee, what are enough meetings? Long term success depends on having the appropriate skills and energy levels available to us at the right time. Work stream improvements are usually embraced. This may include the now out-sourcing of the printing and mailing of our newsletter, the pre-printed attendee registration forms, the reduced information requirements on these registration forms, the once-a-year request for dues and registration, the experiment of jettisoning the hard copy newsletter (since abandoned) in favor of only electronic, and the like. We enthusiastically limit the number of executive committee meetings where possible, schedule around conflicts, and rotate tasks. Should we find a need to recruit more volunteers, we are as likely to contemplate jettisoning a task as to scramble to support it.

**CHALLENGES – HOW WE’VE CHANGED**
Are we successful? Most would argue that we are. Attendance levels at our meetings, activity on our web site, ease of finding sufficient volunteers, and the long list of hosts all offer evidence in support of a program that is working. But are we missing potential audiences? Are we depending on certain critical resources or individuals who, if they left, would be impossible to replace?
We are aware of several nagging issues, largely unresolved, and perhaps not pressing unless attendance plummets.

**WILL ANYONE WHO IS **NOT** HERE PLEASE RAISE YOUR HAND**
And tell us why not. What are we NOT providing which you would like:

- Location
- Agenda
- Timing/frequency

A fundamental concern is to know our target audience. If our current program is a success, then perhaps that is sufficient. The occasional suggestion that we might more often find host sites in Center City has resonance, until we discover the lack of auditorium space for a group our size (Yes, we, know, the Spectrum is usually available). Or for parking. Are there paper topics – which no one is submitting nor asking for – which would appeal to an entirely different audience IF we offered it, and communicated successfully to this here-to-for unseen audience its availability? How can we measure the folks we are NOT reaching? How hard should we try?

**HOW DO WE REACH MANAGERS FULLY-SUPPORTIVE OF TRAINING – AS LONG AS THEIR EMPLOYEES DO NOT NEED TO LEAVE THEIR DESKS?**

Do they think that SAS conferences are junkets? Or they will only send their employees to one conference a year (and PharmaSUG in San Diego may be more glamorous for that one annual trip then, say the Philadelphia Suburbs). Are they afraid of having their employees recruited away? (We have a strong, announced policy in this regard.) Are workloads increasing so that leaving work, on the day of the meeting, becomes hard to justify? (Why would an enthusiastic host find that almost none of its employees were able to walk across the hall to attend any of the presentations, or at least network over refreshments?)

Or was it the weather that scared people away that day? What activities could we add to our program without overly-burdening our volunteers? And maybe travel budgets really are down. Can we better partner (at our General Meetings or otherwise) with SAS? Other LUGs? Independent contractors/trainers, universities, other technical or functional professional organizations?

**CONCLUSIONS**

As described here, PhilaSUG offers a lively program. Our on-going success depends in part on choosing a right-sized program, one which we can support with the resources at hand. Access to critical skill sets and particularly support from the current incumbents for certain roles cannot be over-stressed. Continued development of structure around these roles will help mitigate some of the risk, as will attention to distribution and sharing of tasks. Finally, our location offers a critical mass of SAS enthusiasts, employers, and supportive companies to allow us to carry on a program achieving great success but with a moderate-maintenance effort. We will continue to evolve as the needs of our membership change, but as long as they vote to participate at current levels, we appear to be doing something right.

**REFERENCES:**

ACKNOWLEDGMENTS
SAS is a Registered Trademark of the SAS Institute, Inc. of Cary, North Carolina.

We would like to thank our President and founding father, Barry Cohen, for his assistance and inspiration.

CONTACT INFORMATION
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Appendix A-1 – SAS Support for User Groups

http://support.sas.com/usergroups/index.html

The mission of the SAS Users Group program is to create opportunities for SAS Users to connect across the nation while supporting and fostering an environment of growth, development and education amongst all SAS Users Groups.
Appendix A-2 – SAS Reference Material on Forming Local User Groups

http://support.sas.com/usergroups/docs/forming_local_usersgroup.pdf

Guide to Forming a US SAS® Users Group

In-House, Local and Special Interest Groups

In this guide, you’ll find practical tips for getting your users group started, getting others involved and getting more from your SAS software investment by participating in users group activities.

http://support.sas.com/usergroups/docs/best_practices.pdf

Local and In-House SAS® Users Groups

Best Practices

This document is to be used as a resource for helping to sustain and grow your registered local or in-house SAS users group. Below are some best practices from some of our local and in-house users group leaders on what works best for them when it comes to running their group. Keep in mind that what works for some groups may not work for others. Different users have different needs, and it is important to tailor your group to the needs of the users in your area.
Appendix B – Our Web Site Home Page

[Image of the web site home page]

*PhilaSUG* (Philadelphia Area SAS Users Group) is a non-profit professional organization whose primary purpose is to provide a forum for the exchange of ideas, increased knowledge of SAS software, and professional advancement. Through the generous support of the SAS Institute [*http://www.sas.com*](http://www.sas.com), PhilaSUG members enjoy once a year a speaker from SAS Institute, mailing of our newsletter and four books for door prizes. PhilaSUG also participates in the Speaker Exchange Program of the NorthEast SAS Users Group (NESUG [*http://www.nesug.org*](http://www.nesug.org)). These national and regional groups are able to bring us speakers from outside the Philadelphia area to speak on a variety of topics. In addition, speakers from our own area contribute their expertise, so PhilaSUG meetings always offer a stimulating mix of ideas.
Appendix C – Our Web Site Hit List

134,549 Visitors
Since May 5, 2007

This site was last modified August 11, 2010 at 8:36:00 PM ET (GMT -05 United States Eastern Time). Comments and suggestions are always appreciated, email the WebMaster at webmaster@PhilaEUG.org
Appendix D – Table of Contents

PhilaSUG holds three meetings annually (see the calendar of events) and provides a published newsletter to its members.

### PhilaSUG Table of Contents [with date last updated]:

- Call for Papers [Aug 11, 2010]
- Calendar of Events [August 11, 2010]

### Next PhilaSUG Meeting

**Villanova University**

- Mandatory Registration Link Coming Soon, please check back.
- Parking details and the link to obtaining a parking pass will be sent to all people who register before the deadline [August 11, 2010]

- Membership [Jan 22, '10]
- PhilaSUG-I [Jan 8, '02]
- Frequently Asked Questions (FAQ) [Jan 22, '10]
- Archive of Past Presentations [Mar 24, 2010]
- Archive of Paper Presentations [June 16, 2010]
- Executive Committee Members [Apr 12, '10]
- Policy on recruiting at meetings [Oct 22, '08]
- Position Referral Binders Available at Meetings [Oct 22, '09]
- Employment Opportunities
- SAS I discussion group
- SASR Software WebRing

If you have questions, comments, or concerns about PhilaSUG communicate with your PhilaSUG Executive committee by sending a message to webmaster @ PhilaSUG.org
Appendix E – Some of Our Forms

Executive Committee Documents

- EC's Checklist of Responsibilities for Coordinating a General Meeting
- List of Issues to Discuss with Host for Planning a General Meeting
- Presenter Acceptance and Confirmation Letter
- Speaker Rejection Letter
- Post Presentation Thank You Letter
Appendix F – Post Presentation Thank You Letter

On behalf of the entire PhilaSUG Executive Committee, I would like to thank you for presenting at PhilaSug on Nov 13 at Fleet. Your presentation was well received by our audience. Our feedback is that many attendees found the presentation quite useful.

Again, thank you for your time and effort, and for making the meeting a success.

If you have any other presentations you would like to present at PhilaSug in the future, please do not hesitate to submit the abstract at http://www.philasug.org/abstract.html

Max Cherny
Appendix G – Meeting Check List (Partial)

PhilaSUG Executive Committee
Checklist of Responsibilities for Coordinating a General Meeting
(Updated: 15-Nov-2002)

The task of coordinating our General Meetings has shifted to a Program and a Site Coordinator who are delegates from the executive committee. Following is a checklist of items the Coordinators are responsible for. The coordinators may delegate certain items to other committee members and to the secretary; however, two things must remain true:

1. The Program Coordinator is ultimately responsible for every task being done correctly and completely.
2. The Site Coordinator must remain the primary contact with the host and make sure all host related issues are appropriately attended to.

Please refer to the PhilaSUG document titled List of Issues to Discuss with Host for General Meeting for further information about some of the tasks listed below.

<table>
<thead>
<tr>
<th>Task</th>
<th>President</th>
<th>Program Coordinator</th>
<th>Site Coordinator</th>
<th>Other</th>
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<tbody>
<tr>
<td><strong>Prior to Meeting</strong></td>
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<tr>
<td>Provide guidance to coordinator, as needed</td>
<td>yes</td>
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<tr>
<td>Primary contact with host for whatever arises</td>
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<tr>
<td>Gather possible abstracts (bio, av needs, and length) and bring to meeting</td>
<td>yes</td>
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<td>Abstract Coordinator</td>
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<td>Determine if host wants a speaker slot</td>
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<td>Finalize agenda (speakers/titles) at meeting two months out</td>
<td>yes</td>
<td>yes</td>
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<tr>
<td>Send confirmation letter to each presenter as soon as agenda is set. Request bio, updated abstract and av needs</td>
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<td>yes</td>
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<td>Receive speaker bio’s to bring to meeting</td>
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<td>Discuss with host if they would like to make some opening remarks at the meeting</td>
<td>yes</td>
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<tr>
<td>Receive speaker’s needs and provide to Site Coordinator</td>
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<td>yes</td>
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<tr>
<td>Confirm that presenters have internal approval from their employers. Some companies require approval before external presentations.</td>
<td></td>
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<td>yes</td>
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<tr>
<td>Provide speaker’s av needs to host</td>
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<td>Receive driving instructions, check-in and security information from host, proof read, and pass onto newsletter and webmaster (website)</td>
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<tr>
<td>Provide abstracts and bios for papers, posters, and demos to newsletter and webmaster.</td>
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<td>yes</td>
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<tr>
<td>Draft the general meeting newsletter</td>
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<td>Newsletter Editor</td>
<td>Newsletter Editor</td>
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<td>Proof the general meeting newsletter</td>
<td>yes</td>
<td>yes</td>
<td>yes</td>
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<tr>
<td>Mail the general meeting newsletter</td>
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<td>Newsletter Editor</td>
<td>Newsletter Editor</td>
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<td>Send machine readable newsletter to Webmaster</td>
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<td>Newsletter Editor</td>
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<td>Contact presenters one week before meeting to reconfirm</td>
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<tr>
<td>Coordinate food ordering with host</td>
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<td>yes</td>
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</tbody>
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