

**Society of American Archivists
Council Meeting
March 17, 2021
Virtual Meeting**

**Discussion of SAA's Dues Structure
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BACKGROUND

At the January 13, 2021, virtual Council meeting, Councilors discussed in detail four scenarios for dues structure changes. The goal was to identify the characteristics of a new dues structure that: achieved sufficient revenue to execute the SAA Strategic Plan and maintain an appropriate level of operations; equitably distributed the membership dues burden; emphasized increased rates for Institutional members; simplified the dues structure; and could be implemented as a three-year plan.

After significant review of the four scenarios, the Council instructed the Finance Committee and staff to focus on Scenario D – a three-tier dues structure that would collapse many existing categories and emphasize a significant increase in Institutional member dues rates. It was generally agreed that the benefits of this model were:

- Simplifying the structure is easier to administer and explain to members.
- Removing the salary distinctions would be preferred, as members are uncomfortable disclosing salary information and this change aligns with practices of similar membership-based professional organizations.
- Increasing Institutional members' relative burden of dues revenue reduces the burden on individuals.

Although there is broad agreement that SAA must move away from a salary-based dues structure, transitioning from 17 categories (eight of which are salary-based) to an entirely new structure is a very difficult process. Whatever approach we employ, there will be members who are unduly impacted by large increases. Additionally, because of SAA's tradition of collecting minimal demographic information of members, SAA currently lacks the descriptive data necessary to develop "practice-based" or "size-based" membership categories. Therefore, the directive to develop a transformative dues structure (i.e., one that is not based on current distinctions) is a high-risk proposition that cannot be reliably modeled for planning purposes.

Discussion of this transformative dues structure change also revealed a preference for examining the benefits of membership, and the possibility of having varying benefits packages for different

levels of membership. Although a common practice in professional associations, this approach requires a thorough understanding of members' preferences and drivers of their participation. As with demographic data, SAA has minimal data of these dimensions of member attitudes, and furthermore, it is not readily apparent whether a more consumer-driven model would appeal to membership. In either case, the work required to gather and assess such information is not possible within the current timeframe envisioned for the dues change.

Finally, although the Council is clearly interested in shifting more of the relative dues revenue burden to Institutional members, it remains unclear that will yield more in revenues to help underwrite individual dues rates. For many of our Institutional members (NARA, large private and public colleges and universities, etc.), our pricing might be low, but it is also true that many of these types of members are small institutions that already stretch to join SAA.

DISCUSSION

SAA staff used Scenario D as a starting point to develop a transformative dues schedule, a dues structure not based on salary level. Due to the lack of descriptive information on members (an artifact from years of policy based on privacy concerns), we sought to use member data on length of membership as a proxy for time in the profession. The data values are: Early = 1 to 5 years as member; Mid = 6 to 15 years as member; Later = 16+ years as member. We then analyzed how these data lined up with existing dues categories, and the resulting distribution of individual dues categories within the new "proxy" categories produces wild inequities. With some individual rates going up by as much as \$350 and some down by as much \$245, this approach would clearly not serve SAA's membership or goals. In addition, it falls short of revenue targets, even assuming no attrition. Further, it is obvious that years as a member of SAA tracks only loosely with time in the profession and, in many cases, not at all.

Given the lack of data about our membership, we find that a transformative dues structure change is a much bigger project, requiring input from many stakeholders, and the collection of different and additional data over the course of the next one to two years.

A transformative change in SAA's dues structure requires identifying the basis for new, non-salary-based dues categories, filling in gaps in information about membership, and the will of leadership to advocate for these changes. Currently there is not a consensus about the basis for new categories, and therefore we do not have clear direction about the nature of the data required to establish them.

In the absence of new categories that make sense to leaders or our members, it is inadvisable that we hold a dues referendum on a novel dues structure at this time. Moreover, given that the current structure is unwieldy and outdated, it is not beneficial to simply raise current dues levels and, in fact, that step might cause more harm than good.

Finally, SAA is spending considerable resources and time recruiting a new Executive Director. It would certainly benefit everyone -- staff, Council, and membership -- if we complete the initial staffing transition before having to undertake still another major structural transition to a wholly different system of dues.

DISCUSSION QUESTIONS

- How do we define each of the dues tiers so that members see themselves in the description? If not based on seniority or salary, how do we distinguish among different tiers?
- Should we pursue a transformational dues change? If so, the data we will need will involve several data-gathering projects:
 1. Evaluation of the perceived value of existing member benefits. Should we consider moving to a model in which there are variable benefits of membership depending on dues category?
 2. Re-evaluation of institutional membership and its benefits.
 3. Data gathering about the basis of a new dues structure:
 - a. Stage of career of membership.
 - b. Size of member's employer.
 - c. Independent contractor versus salaried employee versus project-based/contingent employment.
 - d. Other, better factors that form the basis for different dues categories not yet identified.
- In the interim, does the Council want to increase dues under the current structure?

RECOMMENDATIONS

Proceed with a bylaws change that would remove the requirement for dues changes to go before a member referendum, and instead place that fiduciary responsibility in the hands of the Council. This would enable the Council and staff to plan for revenue streams sufficient to execute SAA's strategic goals.

Begin above-referenced projects to develop data sufficient to entirely recast SAA's dues structure.