

**Society of American Archivists
Council Meeting
January 25 – 27, 2012
Chicago, Illinois**

**Staff Report: Membership
(Prepared by Brian Doyle)**

At the end of the second quarter of FY 2012, overall membership remains stable at just under 6,000 total members, virtually unchanged from December 2010. As a result of the dues increase that went into effect on July 1, 2011, dues revenue is \$8,773 (2.4%) higher than last year and deferred dues revenue is \$16,708 (4.2%) higher. However, projections for continued growth, based on trends observed through the third quarter of FY 2011, have not materialized. Rather, membership appears to have plateaued. As a result, we are behind budget by \$17,243 (-4.4%) for the year to date.

Table 1: Membership Growth Rates by Dues Category

<u>Dues Category</u>	<u>Dues</u>	<u>Dec '10</u>	<u>Dec '11</u>	<i>Projected</i> <u>Dec '11</u>	<u>Dec '10- Dec '11 %</u>	<i>Projected</i> <u>FY12 %</u>	<i>Budget</i> <u>Variance*</u>
Associate Domestic	\$80	193	190	212	-1.55%	8%	-\$1,760
Associate Intl	\$95	64	66	76	3.13%	15%	-\$950
Bridge	\$47	97	85	74	-12.37%	-15%	\$517
ID1 (< \$20k/yr)	\$80	887	932	1,056	5.07%	18%	-\$9,920
ID2 (\$20-\$29k/yr)	\$101	251	238	257	-5.18%	3%	-\$1,919
ID3 (\$30-\$39k/yr)	\$124	430	437	385	1.63%	-10%	\$6,448
ID4 (\$40-\$49k/yr)	\$152	609	587	594	-3.61%	0%	-\$1,064
ID5 (\$50-\$59k/yr)	\$180	491	488	521	-0.61%	8%	-\$5,940
ID6 (\$60-\$75k/yr)	\$205	387	418	395	8.01%	0%	\$4,715
ID7 (>\$75k/yr)	\$225	365	375	376	2.74%	3%	-\$225
Lifetime	\$0	14	14	14	--	0%	\$0
Honorary	\$0	2	2	2	--	0%	\$0
Retired	\$67	165	196	169	18.79%	3%	\$1,809
Student	\$47	1,415	1,379	1,695	-2.54%	18%	-\$14,852
Total Individuals		5,370	5,407	5,826	0.69%	8.83%	-\$21,641
Regular Institutional	\$265	464	469	462	1.08%	0%	\$1,855
Sustaining Institutional	\$500	86	79	86	-8.14%	0%	-\$3,500
Total Institutions		550	548	548	-0.36%	0%	-\$1,645
TOTAL MEMBERS		5,920	5,952	6,374	0.54%	8.04%	-\$24,786

* Figures cited are simple calculations derived from the difference between actual December 2011 member figures and the projected December 2011 figures, multiplied by the dues amount. However, due to the deferred nature of dues revenue, as well as the July 2011 dues increase, *these budget variances do not correspond directly to the financial reports.*

A comparison of actual vs. projected growth rates reveals the largest (negative) variances among:

- Members earning less than \$20,000/year (ID1);
- Members earning between \$50,000/year and \$59,999/year (ID5);
- Student members; and
- Sustaining institutional members

Although the staff does not report membership retention rates regularly due to the technical complexity of generating these queries, the FY 2012 budget variances listed above warrant extra attention. As displayed in Table 2:

- Retention among ID1 members is at its lowest in the past 5 years. It's worth noting that 45% of current ID1 members are former student members, compared to 31% of all Full Individual members.
- Retention of ID5 members is strong (87%). The negative variance among ID5 members (-8.6%) is almost exactly offset by a positive variance among ID6 members (8.01%), suggesting that members are simply upgrading their dues category.
- Retention of student members is low (54%), which is consistent with past trends.
- Retention of sustaining institutional members is very strong (92%). Also, the decline in this category is exactly offset by an increase among regular institutional members, suggesting that institutions are downgrading their dues category.
- The lowest paying dues categories (e.g., ID1, Bridge, Student, Associate Domestic, and to a lesser degree ID2) have the lowest retention rates. *The data lead us to conclude that our budget variance can be attributed to a diminished capacity to retain these members.*

<u>Dues Category</u>	<u>Dues</u>	---- PERCENTAGE OF MEMBERS RETAINED ----				
		<u>Dec '07</u>	<u>Dec '08</u>	<u>Dec '09</u>	<u>Dec '10</u>	<u>Dec '11</u>
<i>All Full Individual Members</i>		85%	82%	80%	83%	80%
ID1 (< \$20k/yr)	\$80	79%	76%	74%	75%	69%
ID2 (\$20-\$29k/yr)	\$101	79%	81%	76%	80%	76%
ID3 (\$30-\$39k/yr)	\$124	82%	81%	79%	79%	81%
ID4 (\$40-\$49k/yr)	\$152	86%	83%	83%	84%	82%
ID5 (\$50-\$59k/yr)	\$180	90%	84%	80%	86%	87%
ID6 (\$60-\$75k/yr)	\$205	89%	87%	87%	92%	88%
ID7 (>\$75k/yr)	\$225	N/A	N/A	83%	93%	89%
Retired	\$67	88%	80%	81%	83%	84%
Bridge Rate	\$47	66%	52%	52%	59%	54%
<i>Student Members</i>		55%	55%	49%	53%	54%
<i>All Associate Members</i>		69%	71%	66%	73%	74%
Associate Domestic	\$80	61%	67%	59%	66%	69%
Associate International	\$95	95%	82%	93%	93%	89%
<i>All Institutional Members</i>		93%	91%	85%	89%	89%
Regular Institutional	\$265	92%	91%	84%	88%	88%
Sustaining Institutional	\$500	94%	92%	90%	93%	92%

As reported by the Membership Committee (*see* Agenda Item V.K.), the committee voted in August 2011 to restructure certain aspects of the Key Contact Program. Changes include eliminating the responsibility of Key Contacts to make retention calls to lapsed members. Rather, they will focus on welcoming new members. It was agreed that the former task can more effectively be performed by staff, since headquarters has access to up-to-date information in the database and can assist members in renewing over the phone. We have created monthly procedures for making these calls during the members' dues grace period. Our preliminary findings suggest that this activity will be effective in redressing the trends described above.

Member Needs and Satisfaction Survey

In October 2011, SAA contracted with Indiana-based Association Metrics to conduct a comprehensive member needs and satisfaction survey. In November, Doyle directed a needs analysis phase, soliciting input on project objectives from nearly twenty core stakeholders, including members of the SAA Council, the chairs of the Membership and Diversity committees, the co-chairs of the Annual Meeting Task Force, and senior staff. Some 15 questions were added to the survey instrument as a result of this collaboration. In December, work on the draft was completed and shared with stakeholders for feedback, with final changes being made before the holiday break.

The survey, to be conducted between January 17, 2012, and February 6, 2012, has been promoted in *Archival Outlook* and in *In The Loop*. As an incentive to participants, members who complete the survey will be entered in a drawing to receive a number of prizes, including the grand prize—an Apple iPad 2. The fiscal impact for the project is approximately \$9,000, the majority of which will be paid for out of the Bernice Brack Membership Development Fund.