Society of American Archivists  
Council Meeting  
May 26 – 28, 2010  
Chicago, Illinois  

Action Item: Mandated Periodic Review of SAA Dues  
(Prepared by the Finance Committee: Nancy Beaumont, James Byers, Aimee Felker [Treasurer], Tom Jurczak, Dennis Meissner, and Becky Haglund Tousey)  

BACKGROUND  
At its August 1, 2006, meeting, the SAA Council passed the following motion:  

THAT the SAA Council take to the general membership in August 2007 the following proposal for an increase in member dues, effective January 1, 2008:  

THAT a new membership category be created for those SAA members whose salary is $75,000 per year or greater, and that the annual dues for that category of membership be established as $216;  

THAT a 10% dues increase be implemented for all categories of membership, except for Life and Retired members, effective January 1, 2008;  

THAT SAA dues be adjusted upward every three years, effective January 1 of the third year, in an amount equal to the average annual percentage increase in the Consumer Price Index for the preceding three-year period; [rescinded January 16, 2007]  

THAT the SAA Council may suspend or reduce the triennial increase as economic factors warrant; [rescinded January 16, 2007] and  

THAT SAA evaluate the dues level categories every ten years to reflect the effects of inflation on the overall income of SAA members.  

At its January 16, 2007, meeting, the SAA Council rescinded its previous resolutions regarding a triennial increase (as noted) and resolved:  

THAT the SAA Council evaluate the dues level every year as part of the budget process to ensure adequate funding of the Society’s strategic priorities and operational functions.  

At its August 1, 2009, meeting, the SAA Council established a new Finance Committee charged to: “(assist) the Council in meeting its fiduciary responsibilities by: monitoring the financial health of the organization, ensuring that its assets are protected, and
providing advice and counsel to the SAA Treasurer and Council on financial matters, including the investment program.”

At its February 2-4, 2010, meeting, the SAA Council tasked the SAA Finance Committee to conduct the mandated review of SAA dues and present recommendations for consideration at the Council’s May 2010 meeting.

In February, March, and April 2010, the Finance Committee met by conference calls to review the current dues structure, state of SAA’s financial health, association metrics and recommendations, and financial resources required to ensure SAA’s future stability. SAA Director of Member and Technical Services Brian Doyle participated in these discussions.

DISCUSSION

After careful consideration, the Finance Committee has concluded that implementation of a dues increase, effective July 1, 2011, is critical to support the ongoing financial stability of the organization, to reflect cost-of-business increases since the last dues change (in January 2008), to accommodate changes in non-dues revenue streams (including publications, workshops, and annual meetings), to ensure a fair distribution of the dues burden among the various categories of membership, and to bring SAA into alignment with association best practices and recommendations.

Among the Committee’s key considerations in recommending a dues increase are the following:

- In 2006, prior to the last dues increase, membership growth was at 10% while income growth was only 8.5%. In 2010, membership and income growth have tapered.
- In the early 2000s, SAA experienced a series of atypical years in terms of non-dues revenue growth, with very strong book development (15 books in 3 years) and workshop development, as well as advantageous annual meeting sites. The 2008 recession altered this landscape. Both publication sales and workshop attendance have declined. In addition, annual meeting costs have increased and are expected to continue to increase over time.
- As in other businesses, such operational costs as printing, postage, supplies, office lease, and personnel expenses (including health insurance and benefits) continue to increase.
- To remain the preeminent professional organization representing the interests of archives and archivists, SAA must further pursue its advocacy and public awareness efforts through coalition building and outreach. Such efforts require at least modest funding.
- To sustain itself and continually enhance communication with members, SAA must continue to invest in its infrastructure and technology, including its efforts to make the SAA website more accessible and to enrich its content.
- To assist members, SAA must continue to enhance and upgrade its educational offerings and methods of delivery.
• SAA cannot rely solely on grant support for program development and enhancement, especially as many organizations and individuals compete for agency grants (e.g., NHPRC, IMLS, NEH, and NEA) even as agency budgets are stretched thin.

• SAA’s leaders firmly believe that it is better to propose modest increases than to wait for a full-blown crisis that may require a special assessment. The previous model of not increasing dues for nearly a decade and then implementing a hefty (10%) increase is neither feasible nor responsible. Prior to the last dues increase, the CPI had increased 18%.

• With the proposed dues increase, the Finance Committee attempts to show a sensitivity to all members in all dues categories by a) staggering the dues increase over a three-year period and b) distributing the dues increase in a manner that minimizes the impact on students, retirees, and those with lower salaries.

• The American Society of Association Executives, which represents nearly 11,000 international, national, regional, state, and local professional associations, recommends that associations strive for a ratio of 35% dues revenue / 65% non-dues revenue in order to mitigate swings in non-dues revenue due to economic and other factors.

• In terms of impact to members, the proposed dues increase, over a three-year period, ranges from the cost of a Starbucks’ coffee to two movie tickets. Specifically, for each of the following member categories dues increases would be equivalent to or less than the cost of:

  - Retirees = 1 Starbucks coffee ($2)
  - Students & Bridge = 1 Starbucks latte ($3)
  - ID 1 & 2 = 1 matinee movie ticket ($5-$6)
  - ID 3 & 4 = 1 movie ticket ($9-$12)
  - ID 5, 6 & 7 = 2 movie tickets ($14-$19)

Associate Domestic and Associate Foreign memberships would increase $23 and $37, respectively, while Regular and Sustaining institutional membership dues would increase $53 and $66, respectively. These amounts, spread out over the number of staff who benefit from their institutions’ membership in SAA, are comparable to the latte and movie ticket comparisons.

The benefits of SAA membership continue throughout the year – indeed a lifetime as one develops knowledge, friendships, and professional alliances – much longer than the coffee, latte, or movie experience.

Based on the considerations above, the Finance Committee has the following recommendations.
RECOMMENDATION 1

THAT the SAA Council take to the general membership in August 2010 a proposal that, effective July 1, 2011, a graduated dues increase be phased in over a three-year period according to the following schedule:

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<tbody>
<tr>
<td>Retired</td>
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<td>$67</td>
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<tr>
<td>Bridge</td>
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<td>Student</td>
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<tr>
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<td>$79</td>
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<tr>
<td>ID2 ($20-$29k/yr)</td>
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<tr>
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<tr>
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<tr>
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<tr>
<td>ID7 (&gt;$75k/yr)</td>
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<td>Regular</td>
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<tr>
<td>Associate Foreign</td>
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Support Statement: Implementation of a dues increase, effective July 1, 2011, is critical to support the ongoing financial stability of the organization, to reflect cost-of-business increases since the last dues change (in January 2008), to accommodate changes in non-dues revenue streams (including publications, workshops, and annual meetings), to ensure a fair distribution of the dues burden among the various categories of membership, and to bring SAA into alignment with association best practices and recommendations. Further, the Finance Committee concurs with the 2006 Dues Task Force (consisting of then-Treasurer Ann Russell, immediate past Treasurer Fynnette Eaton, and then-seated Council member Sheryl Williams) that a periodic and modest dues increase is preferable to a less frequent but more significant dues increase. Awareness that a modest dues increase will occur enables members and SAA to budget accordingly and allows SAA to develop programs and balance operational costs with anticipated income. A planned increase also minimizes the risk of financial crisis and reactionary budgeting.

Fiscal Impact: There is no material direct cost associated with implementing a dues increase. Member attrition as a result of a dues increase cannot be predicted at this time. The projected change in revenue based on the proposed model is an increase of $11,058 by the end of FY2012, $34,438 by the end of FY2013, and $62,367 by the end of FY2014.
**RECOMMENDATION 2**

THAT SAA dues be adjusted upward every three years, effective July 1 of the third year, in an amount equal to the average annual percentage increase in the Consumer Price Index for the preceding three-year period;

THAT the SAA Council may suspend or reduce the triennial increase as economic factors warrant; and

THAT the SAA Council continue to task the Finance Committee with an annual review of dues and dues revenue to ensure the organization’s financial health.

**Support Statement:** These changes are necessary to support SAA’s ongoing financial stability, to reflect cost-of-business increases over time, to accommodate changes in revenue streams (including publications, annual meetings, and educational offerings), and to bring SAA into alignment with association best practices and recommendations.

**Fiscal Impact:** There is no material direct cost associated with implementing this recommendation.