



Association of
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Institutional Membership Fee Report

2022



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BACKGROUND

In response to feedback from members during a previous strategic planning process, the ACA Board conceived of a 'white paper' on the membership category. Following initial survey work by the Membership Committee in 2019, a working group was established in Spring 2020. The Institutional Membership Working Group (IMWG) was tasked with examining the Association's Institutional membership category and recommending any changes to the ACA Board.

The IMWG's responsibilities included the following:

1. Profile current, lapsed and prospective Institutional members.
2. Analyze the current benefits for institutional members, including the uptake on those benefits, whether they meet needs, and projected future needs.
3. Analyze the current financial contributions of Institutional members, including the fee structure.
4. Examine the take-up of Institutional member benefits for employees vs. Individual membership take-up, including individual fees.
5. Examine the effect of bylaw changes (anticipated approval in mid-2020) on Institutional membership.
6. Conduct any surveying of members as deemed necessary during 2020 with interim reporting to the Board in December 2020.

An initial low survey response rate prompted the IMWG to extend the survey to March 2021 and also organized a virtual town hall event on March 11, 2021. The survey and Town Hall accomplished tasks 2, 3, 4 and 6.

In June 2021, the IMWG submitted a report presented at the AGM and included in the June 2021 issue of *The Bulletin*. Four broad recommendations were included as part of that report with more specific proposed fees and fee structures to be later presented to the ACA general membership. In the fall of 2021, along with the Individual Membership Review, additional analysis was carried out to reflect current ACA finances, the administrative costs of membership and incorporate updated membership statistics.



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Survey Findings & IMWG Recommendations

Initially, the IMWG planned on contacting 110 institutions across Canada. 39 responses were received. There were various responses from institutional leadership, usually the lead archivist or a designate. There were a strong number of detailed responses.

The majority of respondents were satisfied with the current fee structure. Quantitative survey results highlighted that the most valued member benefits were member rates for professional development opportunities (annual conference and workshops) followed by access to *Archivaria* and networking. Qualitative survey results, as summarized in the June 2021 IMWG report, noted an overall perceived value for holding an ACA Institutional membership, and mixed responses as to whether staff were also encouraged to obtain their own Individual membership. Another element to arise from both association and member feedback was the request for improved communication from ACA about the differences between Individual and Institutional membership benefits and the value for an Institutional membership

The IMWG also contacted 42 associations, including 20 Canadian associations (including provincial/territorial councils), 9 international recordkeeping associations, and 13 associations from related professions. 18 responses were received. Associations were familiar with the ACA as an organization, and, overall, they advised against Institutional membership fee increases.

To supplement the survey data, the IMWG also hosted a Town Hall event on March 11, 2021 as an additional opportunity for feedback from ACA members. At the Town Hall, a brief presentation was made by the IMWG, followed by 4 questions posed to attendees as well as a period of open discussion. The Town Hall consisted of 9 attendees.



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PROPOSED CHANGES TO ACA INSTITUTIONAL MEMBERSHIP

Option 1: Maintain Current Categories and Fee Structure

This option would maintain the current membership fee structure, as suggested by other associations who were surveyed by the IMWG.

# of Staff	Current Cost	# of Institutions	Revenue	Price/per person
0-2	\$273.00	55	\$15,015.00	\$136.50
3-5	\$294.00	37	\$10,878.00	\$58.80
6-20	\$887.00	6	\$5,322.00	\$44.35
21-50	\$1,742.00	4	\$6,968.00	\$34.84
51-399	\$2,587.00	2	\$5,174.00	\$6.48
400+	\$15,543.00	1	\$15,543.00	\$38.86
			\$58,900.00	

- ❖ **Pro** – Easier for the Secretariat to administer.
- ❖ **Pro** – Aligns with suggestion provided by peers.
- ❖ **Con** – Small archival organizations pay the most, when they often have the most limited resources and make up the majority of the ACA's Institutional members
- ❖ **Con** - Does not align with the ACA's Equity Commitments.



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Option 2: Adopt Changes as Suggested by IMWG

This option was endorsed by the IMWG in May 2021. This would adjust the number of staff for the following institutional categories:

- Modify the existing categories
 - From the existing 6-20 staff to 6-10 staff and 11-20 staff.
 - From the existing 51-399 staff and 400+ to 51-250 staff and 250-1000 staff.

# of Staff	New Cost	# of Institutions	Potential Revenue	New price/per person
0-2	\$230.00	55	\$12,650.00	\$115.00
3-5	\$425.00	37	\$15,725.00	\$85.00
6-10	\$750.00	4	\$3,000.00	\$75.00
11-20	\$1,000.00	2	\$2,000.00	\$50.00
21-50	\$1,850.00	4	\$7,400.00	\$37.00
51-250	\$2,750.00	2	\$5,500.00	\$11.00
251-1000	\$16,000.00	1	\$16,000.00	\$16.00
			\$62,275.00	

- ❖ **Pro** – Endorsed by the IMWG as the preferred option.
- ❖ **Pro** - More granular approach to staff member numbers reduces fees for the 0-2 and 251-1000 category.
- ❖ **Pro** – Minor increases to the fees for 11-20 and 21-50 category.
- ❖ **Con** – Increased fees for 3-5 and 6-10 category.
- ❖ **Con** - The price/per person is almost double for the 51-250 bracket.



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Option 3: Modify IMWG Suggestions

This option was proposed by the ACA Board in June 2022. This would adjust the number of staff for the following institutional categories;

Modify the existing categories

- From the existing 0-2 and 3-5 staff to 0-5 staff.
- From the existing 6-20 staff to 6-10 staff and 11-20 staff.
- From the existing 51-399 staff and 400+ to 51-250 staff and 250-1000 staff.

# of Staff	New Cost	# of Institutions	Potential Revenue	New price/per person
0-5	\$285.00	92	\$26,220.00	\$57.00
6-10	\$750.00	4	\$3,000.00	\$75.00
11-20	\$1,000.00	2	\$2,000.00	\$50.00
21-50	\$1,850.00	4	\$7,400.00	\$37.00
51-250	\$2,750.00	2	\$5,500.00	\$11.00
251-1000	\$16,000.00	1	\$16,000.00	\$16.00
			\$60,120.00	

- ❖ **Pro** – Maintains most of the recommendations made by IMWG.
- ❖ **Pro** - More granular approach to staff member numbers reduces fees for the 0-5, 6-10 and 251-1000 category. This approach would address concerns about affordability for small archival institutions (0-5, 6-10 staff). There is also the option to purchase Individual memberships for institutions with 1-2 staff members, which may decrease the overall cost to them.
- ❖ **Pro** – Minor increase to the fees for the previous 0-2 category (+ \$8).
- ❖ **Con** – Increased fees for 11-20 and 21-50 category.
- ❖ **Con** - The price/per person is almost double for the 51-250 bracket.



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Further Discussion

1. Fee restructuring: Option 2 proposed by the IMWG

Based on the feedback received by members via the survey and Town Hall, the IMWG's central observation was that Institutional membership is an asset to small archival institutions. A review of the distribution of the entire Institutional members shows that almost all are in the 0-2 and 3-5 staff categories (55 and 37 institutions respectively, based on early April 2021 numbers). At many of these institutions, staff would not be able to afford Individual memberships at current prices. This applies to existing Institutional members and those the ACA may wish to attract. Another consideration is that the current Individual membership rates are at least partially subsidized by the Institutional membership fees.

2. Consideration for any proposed fee changes should be guided by the principles applied by the IMWG (as stated in the 2021 AGM Bulletin report):

- *Accessibility and inclusion*: the fees and classes should make Institutional membership accessible to the full range of potential Institutional members, especially poorly-resourced institutions.
- *Acceptability*: both the fee levels and changes from existing fees should be broadly acceptable to members.
- *Equitable*: fee levels should be fair to institutions of all sizes.
- *Consistent with individual memberships*: fee levels should be informed by individual fees and benefits to avoid undesired incentives to take up a particular membership class.
- *Justifiable*: fee levels should reflect the benefit likely to be obtained by the institution.
- The ACA is not seeking to increase revenue by increasing institutional fees