

## Joint Board & Budget and Finance Committee Meeting

**Monday, February 6, 2023**

10:00 AM - 12:00 PM CST

[Zoom Login](#)

### Agenda

<b>Time</b>	<b>Agenda Item</b>
10:00–10:10 AM	1.0 Welcome and Minutes Volunteer (Mocnik) ACRL Budget and Finance Chair Joe Mocnik will welcome the Board, Budget & Finance Committee, and guests to the meeting. A volunteer from the Budget & Finance Committee’s 2 Feb meeting will be asked to take minutes for today’s meeting.
10:10–10:25 AM <b>Information</b>	2.0 ALA/ACRL Finance Update (Mocnik/Malone) (no document) The group will discuss ALA’s Operating Agreement Implementation Task Force’s work on budget revisions, which has a goal of standardizing all ALA budgets for FY25. This standardization will have profound impact on ACRL’s budgeting process
10:25–11:00 AM <b>Information/Discussion</b>	3.0 ALA Finance Update (Schneider) Budget Analysis and Review Committee (BARC) Chair, Karen Schneider, will provide us some updates regarding the financial changes that are circulating at ALA. She will speak to membership dues revisions that are being discussed at ALA. It is our hope that Melissa Walling, Associate Executive Director, ALA Offices & Member Relations, can assist in this conversation.
11:00 AM–11:10 AM	Break

<b>Time</b>	<b>Agenda Item</b>
11:10–11:30 AM <i>Discussion/Action</i>	4.0 Individual Membership Dues (Mocnik/Petrowski) #A, #A.1 The Board and Committee will discuss the individual dues rates for FY24. As the committee is responsible for making a recommendation to the Board, the committee will take action on the recommendation. Based on the committee’s recommendation, the Board will take action on the FY24 dues rate.
11:30-11:45 <i>Discussion/Action</i>	5.0 Student Membership Dues (Mocnik/Petrowski) #B, #B.1, #C The ACRL Budget and Finance Committee and Board are being asked to consider maintaining the ACRL student membership dues at \$5 for FY24.
11:45 AM–12:00 PM <i>Discussion</i>	6.0 Next steps/New Business (Mocnik) The group will review any next steps and or topics for future discussions.
12:00 PM <i>Action</i>	7.0 Adjournment (Mocnik)

# ACRL LLX23 Joint Board/B&F Doc A

Association of College & Research Libraries  
225 N Michigan Ave, Suite 1300  
Chicago, IL 60601  
800-545-2433, ext. 2523  
acrl@ala.org, <http://www.acrl.org>



**To:** ACRL Budget & Finance Committee  
**Subject:** Personal membership dues rate for FY24  
**Submitted by:** Joe Mocnik, ACRL Budget & Finance Committee Chair  
**Date submitted:** January 23, 2023

## **BACKGROUND:**

In the spring of 2011, the ACRL membership approved a change to the ACRL Bylaws to vest the Board with the authority to raise personal membership dues rates within the constraint of the increases in the Higher Education Price Index (HEPI). The Bylaws read:

Section 3. Dues. The amount of personal member dues shall be determined by the ACRL Board of Directors. Annually, the Board of Directors will review and may authorize a dues adjustment not to exceed the percentage change in the most current Higher Education Price Index (HEPI) rounded to the nearest dollar. Adjustments in excess of the percentage change in the most current HEPI are subject to the approval of the membership in a mail or electronic vote. Organizational and corporate member dues shall be determined by the ACRL Board of Directors.

The Budget & Finance Committee is charged with making an annual recommendation for personal member dues rates to the Board. To determine its recommendation, the Budget & Finance Committee will consider the association's budget for the coming year and the HEPI in addition to the association's overall priorities and resources. The FY24 personal dues increase is based on the 2022 HEPI annual report which was released in December 2022. Note: student dues have been set at \$5 for through FY23. Note: the ACRL Board of Directors at its June 23, 2020, virtual meeting accepted the recommendation of the Budget and Finance Committee to follow ALA's action and rescind the previously approved FY21 dues increase for personal and retired members as a symbolic gesture of solidarity and compassion during the COVID-19 pandemic.

## **Process for setting personal member dues rates:**

- The Board and Budget & Finance Committee will hold a discussion on the dues rate at their Joint Board/B&F Meeting on February 6, 2023.
- During the Joint Meeting, the Budget & Finance Committee will first take action to determine its recommendation to the Board for the personal member dues rate for the coming year (FY24).
- During the Joint Meeting and following the Budget & Finance Committee's vote, the Board of Directors will take action on the committee's recommendation.
- If a dues rate change is approved during the Joint Meeting, staff will revise the dues rate in the FY24 budget for final action in June or late summer 2023.
- The dues rate change (if any is approved) will begin September 1, 2023, which is the first day of FY24.

## **Actions needed:**

- Budget & Finance Committee discussion of possible dues rates based on 2022 HEPI. Budget & Finance Committee vote on its recommendation to the Board.

## **Calculation of allowable FY24 dues increase:**

- The FY21 HEPI reported a 5.2% increase. 5.2% of ACRL's current personal dues rate of \$70 is \$3.64. Similarly, 5.2% of ACRL's current retired member dues rate of \$46 is \$2.39. Rounded to the nearest dollar the largest increase possible in FY24 for the regular personal member category is \$4.00 and \$2.00 for the retired member category.

## ACRL LLX23 Joint Board/B&F Doc A

*Note:* ALA's eight divisions (AASL, ALSC, ACRL, Core, PLA, RUSA, UNITED, YALSA) have personal dues for regular members ranging from \$50-\$81 (median personal dues rate is \$67). Seven divisions (including ACRL, Core, PLA, RUSA, UNITED, and YALSA) have retired member dues ranging from \$27-\$60.

### **ACTION:**

If Budget & Finance wants to recommend a dues increase, here are the draft motions:

#### **Budget & Finance Committee Motion:**

That the Budget & Finance Committee recommends to the ACRL Board of Directors raising ACRL regular personal membership dues by four dollars (\$4.00) and retired membership rates by two dollars (\$2.00) as permitted by the 2022 HEPI. The FY22 HEPI reported a 5.2% increase. This increase permits increasing the ACRL personal dues rates for FY24 to:

1. Personal members: \$74
2. Retired members: \$48

#### **Board of Directors Motion:**

That the ACRL Board of Directors approves the Budget & Finance Committee recommend to raising ACRL regular personal membership dues by four dollars (\$4.00) and retired membership rates by two dollars (\$2.00) as permitted by the 2022 HEPI. The FY22 HEPI reported a 5.2% increase. This increase permits increasing the ACRL personal dues rates for FY24 to:

1. Personal members: \$74
2. Retired members: \$48

**IF PERTINENT: Have other stakeholders been consulted?** If so, please identify stakeholders and their comments about this action.

**STRATEGIC GOAL AREA SUPPORTED:** Please add additional sheets as needed to explain. (Select the goal area that will be affected most by this action.)

**Value of Academic Libraries**

Goal: Academic libraries demonstrate alignment with and impact on institutional outcomes.

**Student Learning**

Goal: Librarians transform student learning, pedagogy, and instructional practices through creative and innovative collaborations.

**Research and Scholarly Environment**

Goal: Librarians accelerate the transition to a more open system of scholarship.

**Enabling Programs and Services**

ACRL programs, services, and publications that target education, advocacy, and member engagement.

### **FISCAL AND STAFFING IMPACT:**

See attached documents.

**MOTION:**  Above recommendation moved  No motion made  Motion revised (see motion form)

**ACTION TAKEN:**  Motion Approved  Motion Defeated  Other: \_\_\_\_\_

## ACRL LLX23 Joint Board/B&F Doc A.1

FY24 Personal Member Dues Increase Projection								
Category	Current Rate	FY22 HEPI <sup>1</sup> Increase	\$ Amount**	Proposed FY24 Rate	Members*	Projected Revenue	Additional FY24 Revenue	Cumulative Revenue/Loss from FY12 – FY22 Dues Increases/Decreases ****
Personal	\$70	5.2%	\$4.00 <sup>2</sup>	\$74	6,706	\$496,244	\$26,824	\$119,720
Retired	\$46	5.2%	\$2.00	\$48	273	\$13,104	\$546	\$2,310
Students	\$5***	N/A	\$0.00	\$5	788	\$3,940	\$0	-\$185,120
Total					7,767	\$513,288	\$27,370	-\$63,090

\*Based on the ALA August 2022 membership report. Calculations exclude the 192 personal members who pay no dues. Complimentary memberships are given to Spectrum Scholars, pre-1976 continuing members (retired with 25 years of continuous ALA membership), and pre-1976 life members.

\*\*Increase rounded to the nearest dollar.

\*\*\*Note: the \$5 student dues is a pilot program. The Board voted in FY20 to continue this program for an additional two years through FY22 and re-approved to extend through FY23. Current ALA student dues are \$41.

\*\*\*\*This is the amount of additional revenue that the dues increases have contributed over time.

<sup>1</sup> HEPI stands for Higher Education Price Index. The Higher Education Price Index (HEPI) is an inflation index designed specifically to track the main cost drivers in higher education. Additional information is available at <http://www.commonfund.org/CommonfundInstitute/HEPI/Pages/default.aspx>. Data from the annual Commonfund Higher Education Price Index (HEPI) for 2022 was released on December 15, 2022. It shows that inflation for U.S. colleges and universities rose 5.2 percent in fiscal year 2022, an increase from last fiscal year's 2.7 percent rate increase.

<sup>2</sup> ACRL Bylaws Section 3. Dues. The amount of personal member dues shall be determined by the ACRL Board of Directors. Annually, the Board of Directors will review and may authorize a dues adjustment not to exceed the percentage change in the most current Higher Education Price Index (HEPI) rounded to the nearest dollar. Adjustments in excess of the percentage change in the most current HEPI are subject to the approval of the membership in a mail or electronic vote. Preliminary HEPI forecasts are now issued in the spring, summer, and fall, and this document will be updated in spring 2023. 5.2% of ACRL's current personal dues rate of \$70 is \$3.64. Similarly, 5.2% of ACRL's current retired member dues rate of \$46 is \$2.39. Rounded to the nearest dollar the largest increase possible (at this time) for regular member categories in FY24 is \$4.00 and \$2.00 for retired members. Student dues were fixed at \$5 through FY23 and will be reviewed in FY23.

# ACRL LLX23 Joint Board/B&F Doc B

Association of College & Research Libraries  
ALA/ACRL American Library Association  
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Chicago, IL 60601  
acrl@ala.org, <http://www.acrl.org>



## Board of Directors Action Form

To: ACRL Budget & Finance Committee/ACRL Board of Directors

Subject: Student Membership Dues Assessment (2017-2020)

Submitted by: Mary Jane Petrowski, ACRL Associate Director

Date submitted: January 31, 2023

### Background

In June 2017 the ACRL Board of Directors approved reducing ACRL student membership dues by 87.8% from \$41 to \$5 effective September 1, 2017, for a three-year period (September 1, 2017 – August 31, 2020). (See ACRL AC17 Doc 29.0 for additional background.) The analysis was postponed until the ALA accounting office could provide the necessary data for review.

Attachment A provides a brief assessment of the impact of discounting student dues since FY18. Key findings include:

- As of August 2022, ACRL student membership has increased 25.7% (+161) over August 2017 and now stands at 788 which is 10.1% of all ACRL personal members.
- Student membership is the only ACRL personal dues category to show an increase since FY17. All other personal dues categories (regular, retired, non-salaried, support staff, international) declined over the five-year period.
- Student retention was on the upswing before the COVID pandemic occurred.
- More student members who drop their ACRL membership are keeping their ALA membership which benefits the association.
- On average, 20% of ACRL first-year student members who renew convert to a more expensive personal membership (including non-salaried librarian, library support staff, regular).
- ACRL student dues are the lowest of all ALA divisions.

### Stakeholders

The ACRL Budget and Finance Committee is being asked to consider maintaining the ACRL student membership dues at \$5 for FY24.

*Electronic submission is preferred for all Board actions. If electronic submission of the entire document is not possible, please send the Action Form to ACRL Program Officer Allison Payne electronically at [apayne@ala.org](mailto:apayne@ala.org) and the remainder in hard copy.*

**Fiscal and Staffing Impact**

There is no staffing impact, but we expect student membership to increase 1.54% over FY22 since it is a conference year.

**Action Recommended**

That the ACRL Board of Directors approves a student dues rate of \$5 for FY24.

**Strategic Goal Area Supported**

Please see the [ACRL Strategic Plan](#), and select from the drop-down the goal area that will be affected most by this action.

**Value of Academic Libraries**

Goal: Academic libraries demonstrate alignment with and impact on institutional outcomes.

**Student Learning**

Goal: Advance innovative practices and environments that transform student learning.

**Research and Scholarly Environment**

Goal: Librarians accelerate the transition to more open and equitable systems of scholarship.

**New Roles and Changing Landscapes**

Goal: Academic and research library workforce effectively navigates change in higher education environments.

**Equity, Diversity & Inclusion**

Goal: TBD

**Enabling Programs and Services**

ACRL programs, services, and publications that target education, advocacy, and member engagement.

# ACRL LLX23 Joint Board/B&F Doc B.1

Association of College & Research Libraries  
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Chicago, IL 60610  
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## Attachment A FY23 Update on ACRL Student Membership

### Background

In June 2017 the ACRL Board of Directors approved reducing ACRL student membership dues by 87.8% from \$41 to \$5 effective September 1, 2017, for a three-year period (September 1, 2017 – August 31, 2020). After the three-year pilot period, the ACRL Budget and Finance Committee had planned to assess the impact of the change and decide whether to continue to offer discounted student dues as a loss leader. The ALA Membership Office has expressed interest in viewing membership as a loss leader and beginning to experiment with membership discounts in an effort to increase membership.

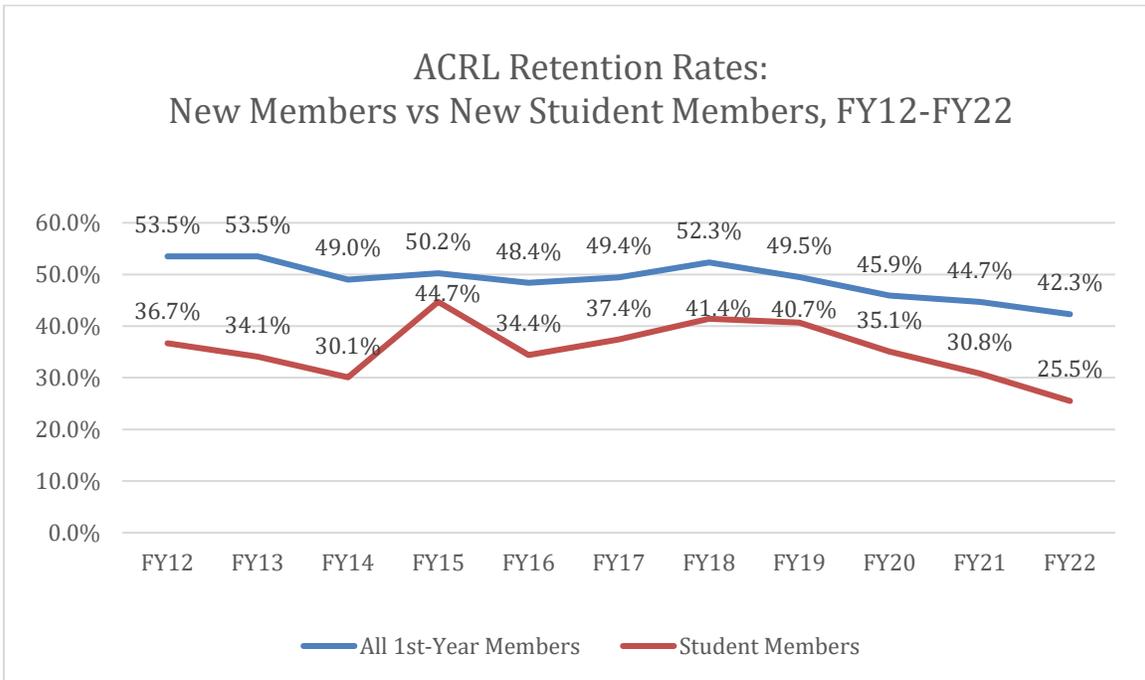
As the table below shows, the only ACRL personal membership category to post an increase since 2017 is student membership.

ACRL Personal Membership Type	FY17	FY22	% Change
International	251	154	-38.6%
Non-Salaried	349	280	-19.8%
Regular	7737	5871	-24.1%
Retired	350	287	-18.0%
Support Staff	155	90	-41.9%
Students	627	788	25.7%

As of August 2022, ACRL student membership has increased 25.7% (+161) over August 2017 and now stands at 788 which is 10.1% of all ACRL personal members. Student membership was approaching FY12 levels (when library schools were providing free memberships to their students) before the COVID pandemic struck.



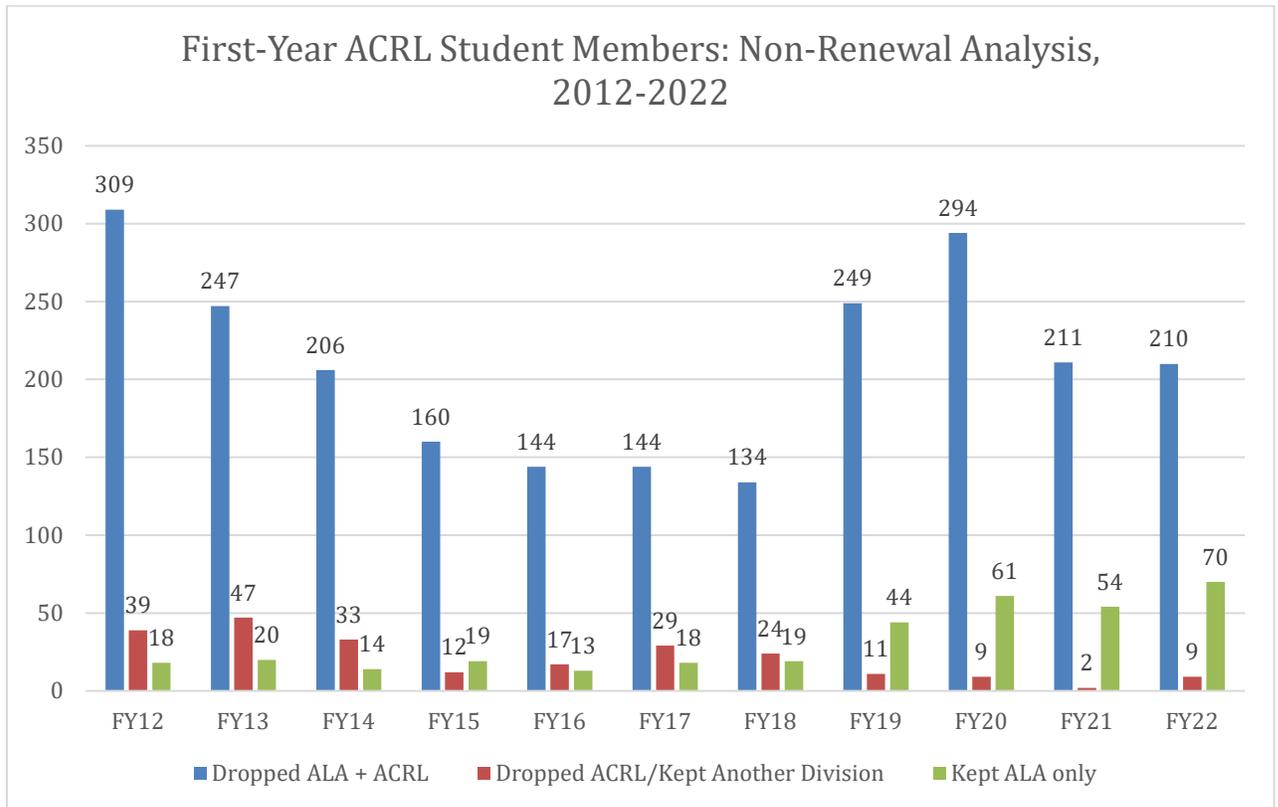
The retention rate for student members was on the upswing prior to the COVID pandemic in 2020. Although the overall retention rate for first-time ACRL members has decreased 11.2% since 2012, declining from 53.5% to 42.3%, student membership renewals have also declined by at the same rate (11.2%) over the same period.



Further analysis shows that since FY12 the number of first-year students who dropped both ACRL and ALA declined by 32% while the number of students who maintain membership in ALA

## ACRL LLX23 Joint Board/B&F Doc B.1

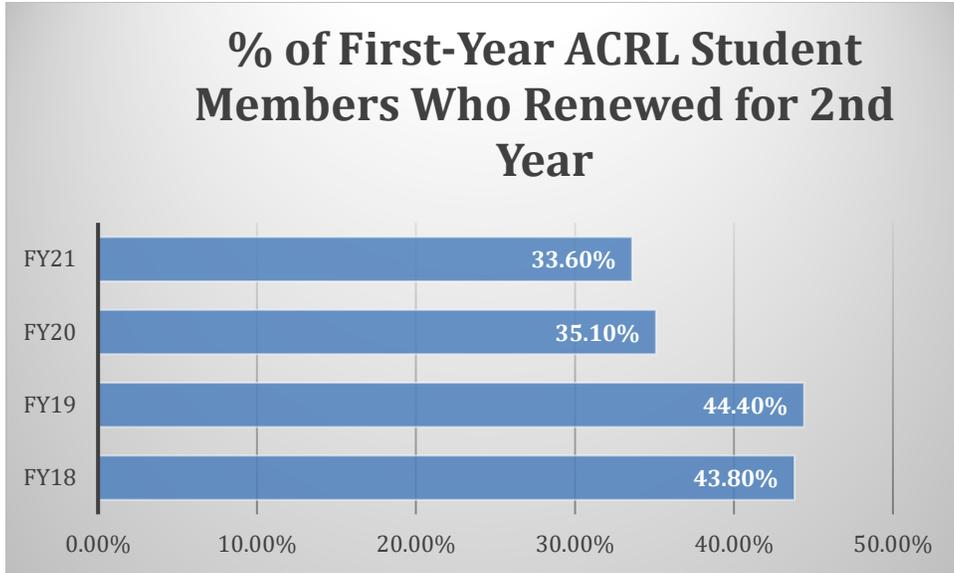
when dropping their ACRL membership has increased by 288%. ACRL student membership is currently \$41 per year.



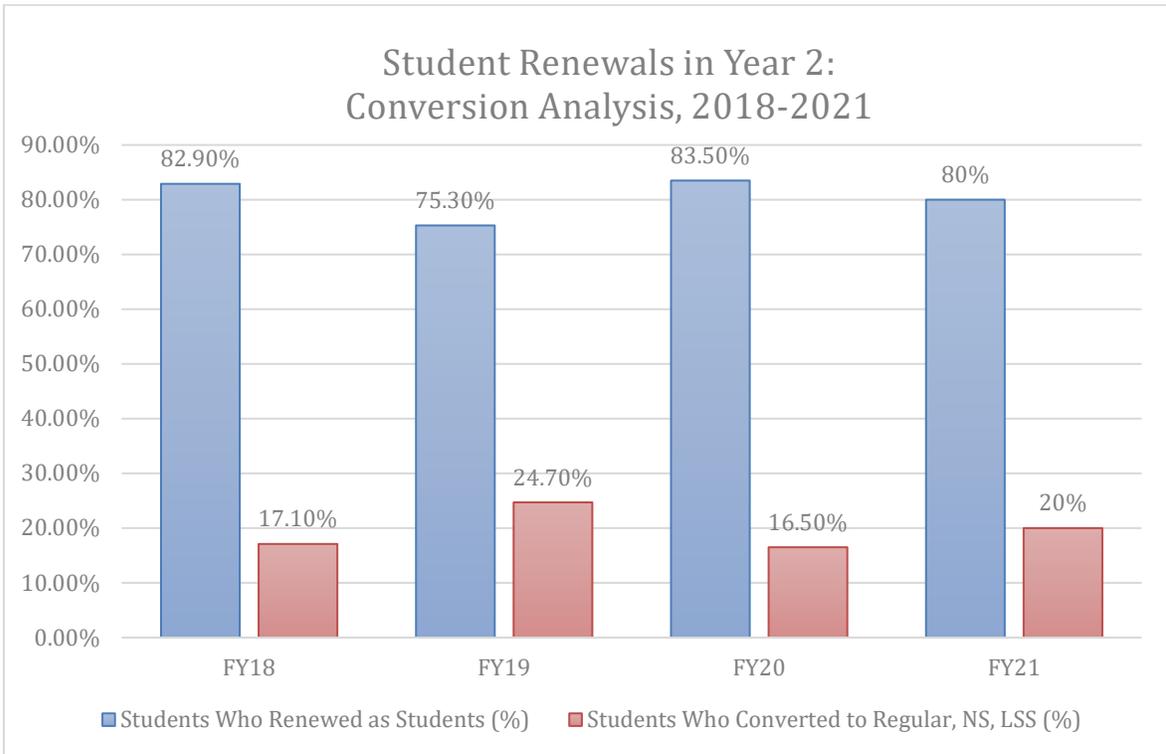
The chart below compares ACRL student membership and membership dues with other ALA divisions. The \$5 dues level is clearly an attractive price point.

Division	Student Members FY22	FY23 Dues
<b>ACRL</b>	788	\$5
<b>AASL</b>	746	\$40
<b>ALSC</b>	359	\$20
<b>CORE</b>	162	\$30
<b>PLA</b>	500	\$36
<b>RUSA</b>	217	\$25
<b>UNITED</b>	47	\$25
<b>YALSA</b>	412	\$27

The chart on the following page looks at the renewal rates for first-year student members who renewed for a second year. The second year renewal rate for ACRL student members has declined 10.2% since 2018, but two of those years (2020 and 2021) were COVID years and are probably skewing the results.



The chart below shows that on average almost 20% of student members convert to form of regular membership (including non-salaried librarian, library support staff, or regular members). Student members can claim student membership for up to five years, so it is not surprising that 80% of first-year student members renew for a second year as students.



## ACRL LLX23 Joint Board/B&F Doc C

Association of College & Research Libraries  
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800-545-2433, ext. 2523  
[acrl@ala.org](mailto:acrl@ala.org), <http://www.acrl.org>



To: ACRL Board of Directors  
Subject: Student membership dues  
Submitted by: John Lehner, ACRL Budget & Finance Committee Chair  
Date submitted: June 25, 2017

### BACKGROUND:

During the past year the ACRL Budget and Finance Committee has considered the feasibility of reducing and/or eliminating student membership dues. Many other professional associations have embraced “freemium” membership models for students with openness as a key goal. By lowering the barrier to access to its community, many associations seek to realize an increase in the perspectives, ideas, and knowledge sharing. By becoming more open, associations aim to become more inclusive.

Library school students first began paying ACRL membership dues in 1981. For twenty-four years (1981-2005), ACRL student members paid the same dues as regular members. During this time, student membership was limited to two years and required at least half-time enrollment in a library science program. In 2006 ACRL student membership was reduced by 23% (\$10) and is currently 35% (\$22) lower than regular membership dues.

*Note:* Eight of ALA’s eleven divisions (ALCTS, ALSC, ASCLA, LLAMA, LITA, RUSA, United for Libraries, YASA) have student dues of \$15-25. The other three divisions (AASL, ACRL, and PLA) have dues of \$32-\$41) with ACRL having the highest student dues of \$41.

During the past 17 years, student membership as a percentage of ACRL personal membership has increased from a low of 4.45% (470) in 2000 to a high of 11.3% (1,330) in 2011. Students currently comprise 6.5% (658) of ACRL personal members. This drop mirrors the decrease in library school enrollments which declined 23.7% between 2009-2015.

Appendix A provides financial models and impact projections for discounted dues ranging from 50%-100% as well as the assumptions for the models.

**ACTION RECOMMENDED:** That the ACRL Board of Directors discuss and take action on the Budget & Finance Committee’s recommendation for student member dues rates in FY18 as detailed in the motion below.

**Motion:** That the Board of Directors approve a student membership dues rate of \$xx.

IF PERTINENT: Have other stakeholders been consulted? If so, please identify stakeholders and their comments about this action.

Ninety-two percent of ACRL student members who responded to surveys in 2016 reported paying their own membership dues and 71% pay their own conference registration fees. In FY16 twenty-four percent (174) of the first-year members who were students did not renew and, according to those who responded to recent surveys, the main reason was that membership dues were considered too high for they received in return.

STRATEGIC GOAL AREA SUPPORTED: Please add additional sheets as needed to explain. (Select the goal area that will be affected most by this action.)

**Value of Academic Libraries**

Goal: Academic libraries demonstrate alignment with and impact on institutional outcomes.

## ACRL LLX23 Joint Board/B&F Doc C

**Student Learning**

Goal: Librarians transform student learning, pedagogy, and instructional practices through creative and innovative collaborations.

**Research and Scholarly Environment**

Goal: Librarians accelerate the transition to a more open system of scholarship.

**Enabling Programs and Services**

ACRL programs ,services, and publications that target education, advocacy, and member engagement.

### FISCAL AND STAFFING IMPACT:

The financial impact and impact on membership are described in Appendix A.

MOTION:  Above recommendation moved  No motion made  Motion revised (see motion form)

ACTION TAKEN:  Motion Approved  Motion Defeated  Other: \_\_\_\_\_

# ACRL LLX23 Joint Board/B&F Doc C

## Appendix A

### Financial Impact Models for Free/Discounted ACRL Student Membership Dues

Regular Member Dues Discount %	Student Member Dues Discounted as a % of Regular Member Dues	Discount as a % of Current Student Dues	\$ Amount of Reduction in Current Student Dues	Cumulative Impact 2018-2022 Assumes an additional 174 student members are retained from 2018-2022				
				Revenue in Y1	Revenue in Y2	Revenue in Y3	Revenue in Y4	Revenue in Y5
50%	\$31.50	23.1%	\$9.50	\$20,727	\$41,454	\$62,181	\$82,908	\$103,635
Potential Lost Revenue				\$6,251	\$12,502	\$18,753	\$25,004	\$31,255
66%	\$21.42	47.7%	\$19.58	\$14,094	\$28,189	\$42,283	\$56,377	\$70,472
Potential Lost Revenue				\$12,884	\$25,767	\$38,651	\$51,535	\$64,420
75%	\$15.75	61.5%	\$25.25	\$10,364	\$20,727	31,091	\$41,454	\$51,818
Potential Lost Revenue				\$16,615	\$33,229	\$49,844	\$66,458	\$83,073
80%	\$12.60	69.2%	\$28.40	\$8,291	\$16,582	\$24,873	\$33,164	\$41,455
Potential Lost Revenue				\$18,687	\$37,374	\$56,062	\$74,749	\$93,436
100%	\$41.00	100%	\$41.00	- 0 -	- 0 -	- 0 -	- 0 -	- 0 -
Potential Lost revenue				\$26,978	\$53,956	\$80,934	\$107,912	\$134,890

The discounted student member dues rate is calculated using the FY17 ACRL regular membership dues rate of \$63 and for the purposes of this projection assumes no increase in regular member dues for the next five years. The dollar value of the discounted student membership dues is also shown relative to the current student membership dues rate using the FY17 student member dues rate of \$41 minus the dollar amount of the discount. For example, if the student dues rate is based on a 50% discount off the ACRL regular dues of \$63, the student rate would be \$31.50. However, “lost” revenue would only be \$9.50 (\$41.00 – \$31.50). Such a discount would lower the current student dues by 23.1% (a reduction of \$9.50 from what students currently pay). For the purposes of projections, a student membership of 658 is assumed (based on the May 2017 membership report).

As the charts below illustrate, the elimination of student dues has the potential to trigger a compounding effect whereby students who would normally fall away are retained year-over-year. With all other factors remaining equal, retaining 174 additional students year-over-year could restore ACRL membership to levels not seen since 2007. However, increased numbers does not mean increased revenues. If this approach is taken it would be important to put in place communication and possibly incentives to induce students to convert their free membership to a paid membership upon graduation and finding employment.

**Projected Impact of Eliminating Student Dues on ACRL Membership**

Fiscal Year	Average # of New Members	# of New Student Members	Projected # of New Student Members Retained with Free Membership	Projected impact on total ACRL Membership 5 Years Forward				
				% increase over FY16 in FY18	% increase over FY16 in 2019	% increase over FY16 in FY20	% increase over FY16 in FY21	% Increase over FY16 in FY22
FY18	1,000	485	174	1.6%				
FY19	1,000	485	384		3.6%			
FY20	1,000	485	522			4.9%		
FY21	1,000	485	696				6.5%	
FY22	1,000	485	870					8.2%

These projections are based on the following assumptions:

- Membership increases are based on FY16 membership of 10,592 (a non-conference year)
- Student members will continue to constitute 48.5% of all new ACRL members;
- New members continue to join ACRL at the rate of at least 1,000 a year. This number is the 22-year average of ACRL new member acquisition.
- Historically, at least 24% of student members drop their ACRL membership after their first year. It is this group of members we might reasonably expect to retain with free student memberships. These projections use the FY16 loss rate (174 new student members) to calculate the membership growth.
- That free membership will help to retain 100% of the student members who drop their ACRL membership for the full 5 years of eligibility.

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- ALA will continue to limit ACRL student membership to 5 years and that students will continue to be ACRL members as long as ACRL membership is free.
- Student members will be willing to pay ALA student membership dues (currently \$36).

Fiscal Year	Average # of New Members	# of New Student Members	Projected # of Student Members Retained with Free Membership	Projected Impact on ACRL Membership Over the Next 5 Years				
				1.6% increase in FY18 over May 2017 membership of 10,766	3.6% increase over FY17 in FY19	4.9% increase over FY17 in FY20	6.5% increase over FY17 in FY21	8.2% Increase over FY17 in FY22
FY18	1,000	485	174	10,938				
FY19	1,000	485	384		11,322			
FY20	1,000	485	522			11,844		
FY21	1,000	485	696				12,540	
FY22	1,000	485	870					13,410

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