



To advance the
profession of editing

WP4

**PROJECT FOR TRANSITION OF IPEd MEMBER SOCIETIES TO
THE DIRECT MEMBERSHIP MODEL**

MEMBERSHIP PROJECT TEAM

**MEMBERSHIP ISSUES PAPER
(WHITE PAPER SUPPLEMENT)**

SEPTEMBER 2015

Membership Issues Paper (White Paper Supplement)

To be read in conjunction with the Membership White Paper, Proposed Membership Structure

This Issues Paper summarises the outcome of discussions during the process of formulating the proposed structure, including feedback from other Transition Project teams, WP4 members, IPEd Council, the Accreditation Board, and society committees and members.

The Transition Project teams are Legal & Governance (L&G), Finance & Operations (F&O), Professional Development (PD), Communications (Comms), Membership (M'ship).

Topic	Discussion points																																
Overall structure	<p>The main advantages of national membership are: centralised administration, freeing committees to focus on policy and professional issues; ability to advocate from a strong national stance for members and the profession; equity of services, including professional development, for all members, regardless of location.</p> <p>The responses to the specific membership questions attached to the 2014 national survey (352 received, or 24% of total membership) indicate the following shifts in membership category if offered as originally proposed (full results have been sent to society committees and are on the IPEd website):</p> <table border="0"> <tr> <td>Professional</td> <td>62.8% (74.9% currently)</td> </tr> <tr> <td>Senior Professional</td> <td>11.6%</td> </tr> <tr> <td>Retired</td> <td>3.4%</td> </tr> <tr> <td>Honorary Life Member</td> <td>3.7% (3.7% currently)</td> </tr> <tr> <td>Concession (voting)</td> <td>6.0%</td> </tr> <tr> <td>Associate</td> <td>15.3% (17.7% currently)</td> </tr> <tr> <td>Student</td> <td>1.7% (1.1% currently)</td> </tr> <tr> <td>Concession (non-voting)</td> <td>2.3%</td> </tr> </table> <p>12.8% (45) were employees of a company that may become a corporate member.</p> <p>For the audit of member numbers at 31 May 2015, IPEd requested a breakdown of categories to assess likely transfers under DMM. This is the overall breakdown (total members 1576, not including 8 Corporate members):</p> <table border="0"> <tr> <td>Full/Professional</td> <td>62% (includes all WA members)</td> </tr> <tr> <td>Honorary Life</td> <td>3%</td> </tr> <tr> <td>Full Retired (Qld only)</td> <td>0.2% (of Qld total 1%)</td> </tr> <tr> <td>Full Concession (Qld only)</td> <td>0.2% (of Qld total 1%; has increased for 2015–16)</td> </tr> <tr> <td>Associate</td> <td>32%</td> </tr> <tr> <td>Associate Retired</td> <td>0%</td> </tr> <tr> <td>Assoc Conc (Qld only)</td> <td>0.1% (of Qld total 0.4%; has increased for 2015–16)</td> </tr> <tr> <td>Student (Vic, NSW, SA)</td> <td>2%</td> </tr> </table>	Professional	62.8% (74.9% currently)	Senior Professional	11.6%	Retired	3.4%	Honorary Life Member	3.7% (3.7% currently)	Concession (voting)	6.0%	Associate	15.3% (17.7% currently)	Student	1.7% (1.1% currently)	Concession (non-voting)	2.3%	Full/Professional	62% (includes all WA members)	Honorary Life	3%	Full Retired (Qld only)	0.2% (of Qld total 1%)	Full Concession (Qld only)	0.2% (of Qld total 1%; has increased for 2015–16)	Associate	32%	Associate Retired	0%	Assoc Conc (Qld only)	0.1% (of Qld total 0.4%; has increased for 2015–16)	Student (Vic, NSW, SA)	2%
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Proposed fee levels	<p>The previous iteration of this paper explained that the original fee structure had been based on the provisional budget from the 2013 Business Case. It also explained that fees would likely be reduced to \$240 for Professional members and \$160 for Associates, for example, with final figures needing to be identified through preparation of a revised budget.</p> <p>However, with the agreed more gradual approach to transition, some services will not be put into place immediately and therefore the cost of staff to develop and provide those services will be greatly reduced.</p> <p>Fees are proposed at (in the initial year, at least): Professional and Senior Professional \$180 Associate \$135 Student \$65 Corporate ranging from \$360 to \$1260.</p> <p>Subscription levels (not categories) are proposed at: Retired members and those requiring temporary leave \$85 Concession-card holders and those undergoing hardship \$65.</p> <p>All fees are GST inclusive.</p> <p>The range of categories and subscription options seeks to provide flexibility for members to opt for the most appropriate category and select subscriptions to suit their circumstances.</p> <p>As further services are added, fees may need to be increased, based on budgeted costs, but any fee increase over 15% would need to be voted on by members.</p> <p>Current Society fee levels: CSE \$135, \$105, Student \$45 NSW \$105, \$85, Student \$45 Qld \$150, \$90, (Retired \$70 , Concession \$50) SA \$110, \$75, Distance/Student \$60, \$45 Tas \$150, \$100 Vic \$95 (Full and Associate), Distance \$62.50, Student \$54.50 WA \$100 (\$80 concession)</p>
Membership system	<p>Under volunteer membership administration through society committees, many have understandably sought to simplify membership categories to reduce the work involved. However, under direct membership, IPEd will use a powerful membership system, MemNet. This system, which is currently used by Editors Victoria, can cope with multiple categories, different joining dates and other complexities.</p> <p>The system gives members online access to join, renew and update their details, to upload documents and pay through a variety of methods, including a 'pay later' option for EFT, BPay and cheque payments. Existing members will retain their current joining date but new members will be recorded from their actual date of joining, avoiding the issue of part-year joining fees.</p> <p>The system also records member take-up of professional development through online registration for branch training events and conferences. It will also operate the national freelance register with multiple search fields (see below).</p> <p>The system will not be not part of the IPEd website but is accessed through the website.</p>

Topic	Discussion points
Professional category (voting)	<p>As the equivalent of Full membership, all current Full members (Professional in New South Wales), will automatically be transferred to IPEd at this level. Western Australian members will need to decide which category to apply for, using the criteria supplied in the Proposed Structure paper. WA Applications for Professional or Senior Professional membership will need to be assessed by the national Membership Officer (MO) as Western Australia does not currently differentiate between Professional and Associate members. All applications for Senior Professional will also need to be assessed by the MO.</p> <p>This category has received overall acceptance, except from Western Australia, whose committee wishes to retain its system of not differentiating between voting (Professional) and non-voting (Associate or Student) members.</p> <p>International arrangements</p> <p>The UK's Society for Editors and Proofreaders (SfEP), since January 2012, has offered automatic acceptance of IPEd Accredited and Distinguished Editors as full ('Ordinary') members, on application, rather than needing to go through SfEP's usual assessment process. IPEd has negotiated with the member societies to offer equivalent membership rights to SfEP 'Ordinary' and 'Advanced' members who apply for Full or Professional membership.</p> <p>IPEd has also proposed that its member societies offer this recognition to applicants who have certification from the Board of Editors in the Life Sciences (BELS), which offers the internationally recognised qualification ELS, as is offered by SfEP. However, as ELS is a specialist qualification, it would not be able to offer a reciprocal arrangement.</p> <p>It is proposed that acceptance of these members from SfEP and BELS would be automatic under IPEd direct membership.</p> <p>IPEd has also sought a similar arrangement with the Editors' Association of Canada (EAC) and South Africa's Professional Editors' Group (PEG). IPEd would offer this arrangement to certified or accredited members from those organisations. None of the national US editors' organisations has an accreditation scheme and so is not appropriate for such consideration.</p> <p>All of the committees have now approved this arrangement and it has already been put into place through IPEd and the society committees; it is not dependent on the outcome for the DMM.</p>
Senior Professional category (voting)	<p>This category will be held over for further consideration by the new IPEd Council and members under the direct membership structure, should it proceed.</p> <p>Discussion points have been retained here in order to inform future debate.</p> <p>The name of this category was changed in order to avoid confusion with Advanced Accreditation should it be offered in the future (it was originally named Fellow but changed due to objections). The category seeks to give recognition to very experienced members who have contributed to the profession. It is not related to accreditation and it would not attract a postnominal.</p> <p>Criteria proposed include 10 years of experience plus 5 years of branch (or society) membership (or of an equivalent overseas professional association). The following attributes, as attested to through CV and other relevant documentation, would be assessed through a points system: qualifications, including accreditation; ongoing professional development; breadth of experience; significant, recognised achievements within the profession; and society/branch/IPEd involvement. DEs would be accepted as Senior Professional members automatically on application (just as AEs are currently accepted as Full or Professional members). All applications for Senior Professional would be assessed by the MO and an additional appointed assessor.</p>

Topic	Discussion points
Honorary Life members	Existing Honorary Life members will be retained. New Honorary Life members may be nominated by their branch committee with endorsement by IPEd Council, or by IPEd Council with branch endorsement.
Associate category (non-voting)	<p>All current Associates will be transferred to IPEd at this level unless they wish to apply for Professional membership. WA members will need to choose the most appropriate category to apply for, using the criteria supplied in the Proposed Structure paper.</p> <p>Currently in most of the societies, Associate members may be appointed to committees, though some exclude executive positions. The proposed by-laws now state that, provided a majority of the branch committee are voting members, the committee may invite financial non-voting members to join the committee.</p> <p>It is acknowledged that some Professional members may strike extended periods of little editorial work and may apply for a transfer to Associate membership. This is not to be viewed as a casual change but as the result of an ongoing lack of work. If a member is taking leave for an extended period (minimum of 6 months) they may apply for a subscription rate, retaining their Professional category.</p> <p>Most feedback agreed with the intent and criteria of this category, except from Western Australia, whose committee wishes to retain its system of not differentiating between voting and non-voting members, and Tasmania, which wishes to retain non-voting members on committees (now addressed).</p>
Student category (non-voting)	Many award courses are classified by course providers as part time; therefore both part-time and full-time students are eligible. If editors meet the requirements for Professional membership, including regular and ongoing work as an editor, they should be Professional members. Submission of the applicant's CV is therefore required. This category is intended for entry-level students.
Corporate membership (non-voting)	<p>Corporate memberships are a way to encourage publishing companies to keep their staff engaged with the profession, not just internally.</p> <p>Fees are now proposed at \$360 for 2–3 editorial staff; \$720 for 4–6 staff and \$1260 for 7–10 staff. Companies that employ more than 10 editors can take out additional memberships. The fee levels have been brought into line with the overall reduced levels offered.</p> <p>The norm across other professions is that Corporate membership is a non-voting category as the individuals it benefits are not subject to criteria. This is one of the incentives for those individuals to request their employer pay for their Professional membership rather than take a Corporate membership. Employees of a Corporate member who wish to have voting rights will need to take out an individual membership.</p>

Topic	Discussion points
Retired and temporary leave subscription (voting and non-voting)	<p>Members who are 65+ and are retired can provide IPEd a wealth of experience and knowledge that could otherwise be lost to the membership. In order to encourage these members to retain their membership, a retired subscription will be offered across all categories (though obviously not for Students) for a fee of \$85.</p> <p>The 'retirement' age of 65 has been selected as this is slightly lower than the current Commonwealth pension age (which now ranges from 65 years and 6 months, for those born up to 1953, to 67 years for those born in 1957). It may need to be reviewed in line with changes to legislation.</p> <p>In addition, the issue of temporary leave has been raised during member feedback. It seems reasonable to offer a temporary leave subscription level if a member is not working for a minimum of six months, also for the fee of \$85.</p> <p>Both retired members and those on temporary leave should not be working substantially in any capacity. It is understood that this is a subjective description but anything more prescriptive is also likely to cause contention. It really is an honour system, requiring a degree of trust in the membership not to abuse.</p> <p>We propose to set up an online claim form, in which the member will give a signed declaration of their circumstances. This subscription is intended for members who have genuinely retired or are genuinely on leave. It will be up to the MO to assess each request case by case.</p>
Concession subscription (voting and non-voting)	<p>Members of all categories can apply for a concessional fee if they hold a Commonwealth concession card. The fee of \$65 is the same for all categories. This subscription has generally been received positively. Recent trialling of the system in Qld has so far produced requests from 10% of membership renewals (Full and Associate members).</p>
Hardship (voting and non-voting)	<p>It is acknowledged that members may, from time to time, suffer personal or financial hardship yet not be eligible for a Commonwealth concession card. This is to be assessed case by case and would require a signed declaration of their circumstances.</p> <p>Various views have been offered as to whether these cases should be assessed by the national membership officer alone or referred to the branch committee (or a nominated member of that committee). The former provides increased anonymity; the latter may allow guidance through knowledge of personal circumstances. It would seem reasonable to allow the member to nominate which is to assess. The fee of \$65 (the same as Concession subscriptions) is the same for all categories.</p>
PD discounts for regional members	<p>No discount for regional membership is offered under the national structure. Only two societies currently offer discounted membership for distance members, Victoria and South Australia (and SA has reported no members in this category at May 2015), for those living more than 50 km from the metropolitan CBD. Queensland removed its distance member category in 2013 with very little loss of membership (still at 28% of total membership).</p> <p>The greatest disadvantage for regional members is the extra cost of attending professional development workshops. This is now a matter for the PD team, which is developing a system of proposed discounts for PD.</p>
Branch membership	<p>Under the constitution, membership of the national body is via a single 'home' branch, usually the place of residence of the member, with reciprocal rights from any other branch, or sub-branch. This precludes membership of multiple branches. Members, especially those with dual or multiple memberships, can nominate which branch they will belong to.</p>

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<p>Editorial Services Directory, for Professional members</p>	<p>All societies currently have a Freelance Register or Editorial Services Directory and these were proposed to be merged to form a National Freelance Register. However, to make the national register more inclusive, it is now proposed as the Editorial Services Directory, for listings by Professional members only.</p> <p>There has been further consideration to allow inclusion of small businesses and partnerships (cross-referencing of a business name to a member's name was in the original proposal). It has been suggested that an organisation entry (not a Corporate member entry) may list Professional members of the organisation but not Associates or Students. The entry could give the number of editorial staff, with non-Professional members counted in that number but not listed. A group fee, based on the number of listed members, could be considered by a future IPEd Council and branches. In the meantime, organisation staff who are Professional members may take out individual entries only but can cross-reference the employer organisation's business name and list other employees who also list in the directory.</p> <p>The national directory would be set up through MemNet and have multi-search fields. It will be organised by branch but searchable nationally, through keywords, subject specialties, services offered and product types, as well as by region, surname and business name. The national directory will use a combination of the search fields offered by the existing registers and introduce improvements, such as inclusion of member ABN, explanation of AEs and DEs, and image upload. Development of the register needs to be conducted jointly by the F&O, Comms and M'ship teams.</p> <p>Some societies currently charge an additional fee for entries, others include it in the membership fee. As not all members wish to list in the register, and data entry will be by member self-service, a modest additional annual subscription of \$40 is considered reasonable. Although members do write their own entries (as they do for existing registers or directories) and submit them to the system, the entries will still need to be checked and administered. Societies that currently charge an additional fee for register: Qld \$40, NSW \$40, SA \$65, Vic \$90. Societies that include in membership fee: CSE, Tas, WA.</p> <p>All committees are in favour of a national register, though two (CSE and WA) suggested it should be part of the membership fee. However, this would have members who do not want a listing subsidising those who do, which is opposed by most committees and members.</p>
<p>Register of Associates Available</p>	<p>A register of Associates was proposed (as is offered by SfEP), with access to it given to members only (not public), in order to subcontract suitable work (with client permission only) or provide referrals for those whose work is known. The intent was to give Associate members opportunities to gain experience and encourage them to progress to Professional membership. The site would carry a statement that listing in the register does not imply an endorsement (as would the Editorial Services Directory). The title would be changed to Associates Available. We could also include a note regarding the ethics and practice of subcontracting (on this and the Editorial Services Directory). An annual subscription of \$20 was considered reasonable.</p> <p>This proposal is not fully supported by several of the committees, on ethical and legal grounds. As there are no criteria for Associate members, a CV would be required to list. SfEP has two grades of what used to be Associate members, Entry level and Intermediate, with only Intermediate members allowed to list on their similar list. For more information, go to the SfEP site. Assessment along these lines would also require more administrative work of the Membership Officer.</p> <p>If members show an interest in this type of service, it may be investigated further in the future. It will not be put into place immediately.</p>

Topic	Discussion points
Other comments (other policy matters)	<p>Joining fee: The \$30 fee would apply to new members (and lapsed members rejoining after 12 months) and to those who apply to move from Associate to Professional or Professional to Senior Professional. (It would also be charged in rare cases of a Student member moving to Professional.) It would not be charged for Students moving to Associate or to those applying for subscription levels such as Retired, Concession or Hardship.</p> <p>The fee is intended to offset the administrative cost of the MO checking of CVs, referees and other documentation, as appropriate. Additional assessors of Senior Professional applications would also be paid.</p>
	<p>Payment of fees: The allowance of quarterly instalments (by direct debit only) is particularly supported for members with a poor or intermittent cash flow; this may be all they need to not require 'hardship' consideration. It is easily administered by the MemNet system. It will be available to all members on request.</p>
	<p>Term of membership: All members will be transferred automatically under their existing categories if they match the new categories. Only those who wish to apply for a new category (e.g. Student, Associate, Senior Professional) or subscription (Concession, Retired) will need to submit an application in order to be transferred. Transferred members will be credited with the unexpired portion of their society fee and will be required to pay the balance of the IPEd fee for that unexpired term.</p>
	<p>Lapsing of membership: We have revised the grace period to 90 days and this is now reflected in the constitution.</p> <p>The due date is the anniversary of joining; for pre-existing financial year members, for example, 1 July, so they become unfinancial after 30 days (31 July) and will lapse after 90 days (29 September) with the member deemed to have resigned. Using MemNet, this will be strictly adhered to. Quarterly payments could assist but would also be subject to the 90-day grace period.</p> <p>A lapsed member's entry in the Editorial Services Directory (or register of Associates Available should it be implemented in the future) would be removed, regardless of the date of payment for the entry, as the directory is for members only.</p>
	<p>Code of ethics: The code of ethics will be developed by the Legal & Governance Team and/or IPEd Council after the vote on direct membership and regardless of the outcome of that vote. There is much to consider in its development.</p>