



Item 12B

MEMBERSHIP REVIEW TERMS OF REFERENCE

This document sets out the proposals for a review of the ACES membership principles and seeks approval from ACES Council to proceed with the review.

Purpose and context

ACES is a membership organisation and exists to serve the needs of its members who operate within the public sector. The association adopted the name ACES in 1995 (following the amalgamation of CLAVA and ALAVES in 1986 to form LAVA) with key criteria for membership being that its core members were “Chief Estates Surveyors”. In the following period the criteria expanded to include “Property Managers” acknowledging that the role of surveyors in the public sector had changed and that not every organisation has a Chief Estates Surveyor, or even a qualified surveyor in any of its senior property positions.

The role of public sector surveyors or property managers is continually evolving and if the Association is to remain relevant and be able to sustain a viable level of membership (both to ensure that its running costs are covered and that it can attract sponsorship, advertising and external support) then a review of its membership policies should take place on a regular basis, or in response to a specific event (e.g. closure of the SAM diploma course).

What has been undertaken so far?

2016 Membership review

The last formal membership review commenced in 2016 and concluded with a report to Council in January 2018. Council debated the recommendations at length, and it was agreed that in general the recommendations were approved subject to some amendments and clarifications particularly regarding membership criteria for individuals in the private sector. Some recommendations in the review did not flow directly from the survey and would be dealt with separately. It was also agreed that a 3 Year Business Plan should be developed.

This review will reflect on the 2018 report and identify any outstanding actions or areas for further consideration.

Survey results and report to Council attached for reference.

Business Plan 2023 - 2026

During the development of the Business Plan refresh, members were asked to comment on membership issues – the review will reflect on the comments provided.

FACES

Over 150 public sector employees have been identified as being linked to existing ACES members and on a path to achieving RICS surveying qualifications. These individuals do not automatically qualify for membership but as an association we want to encourage new entrants to the surveying profession to consider public sector property management as viable career.

AGM / Council discussions

General discussion has taken place at the last few Council meetings of the need to consider a review of the membership criteria and structure.

Scope

In scope – membership categories, individual v corporate memberships, membership eligibility, membership application process, officer / post holding criteria, approval of membership applications, and cessation / termination of memberships. Fee Structure – but not the level of fees

Out of scope – Level of fees, invoicing and payment methods. It is anticipated that these will form part of a further review if the recommendations (if any) in the review are approved.

Personnel involved.

The review will be undertaken by a working group of no less than 2, no more than 7 members and be led by Helen Stubbs (Immediate Past President).

Invites for the working group will be issued no later than 5th May 2024 and the intention is that other than Helen Stubbs, working group members will not form part of the core management team or Council and be drawn from the wider membership with the aim of including those members who are not typically active in the activities of ACES.

This working group will establish how it wishes to take forward the review and how the views of the wider membership, including core management team and Council will be sought.

The core management team will review the draft report prior to submitting to full Council for consideration.

Approval process

Membership categories and eligibility is a key component of the constitution. Changes to the ACES constitution can only be actioned at the Annual General Meeting, the next of which is November 2024. Approval of the recommendations within the membership review can only therefore be approved at the Annual General Meeting unless they are delegated to full Council during the Annual General Meeting (AGM), or as per clause 8.3 of the Constitution a General Meeting or Special Meeting is convened for that purpose.

Timescales

Subject to the working group proposals and timescales, it is the intention that the finalised review and recommendations will be brought to full Council no later than the July Council meeting to enable review and recommendation from Council to take the proposal to the AGM. In the event that Council is unable to recommend taking the proposals to the AGM, or the review is not concluded in time, then the report may be brought back to the October Council meeting.

Financial Resource

No financial expenditure is envisaged to undertake the review and submit the report. The recommendations within the report may however have financial implications.

Evaluation and review

It is anticipated that any recommendations from the review will be approved by members at the AGM and potentially may take immediate effect. This may necessitate changes to the website, updates to the constitution etc and the approval of these and timescale for implementation will be factored into the report to the AGM.

The review will identify how “success” will be measured and the review periods for this measurement. (for example, if a recommendation is to allow a new category of APC students, then it will be measured by how many students take up this membership offer and reported back).

Helen Stubbs
Immediate Past President
ACES
12th April 2024