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## [Inc-business] May 2023 Membership Report & Updated Methodology

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Wed, Jun 28, 2023 at 2:19 PM

Hi everyone,

I recently shared that we've had some breakthroughs in how we measure membership accurately. Our team was also able to apply this method to state-by-state breakdowns of national members. I've just received those, and we are now able to publish May membership stats.

These more accurate methods revealed we have significantly more Sustaining and Life Members than previously recorded, so in addition to the attached report, I've added more information on the updated method and numbers below.

State Chairs and Membership Directors, send us your questions and request state membership counts in [this survey](#).

Members, want to check your member status? Fill out [this survey](#) and someone will confirm your status. We can also help you enroll in auto-renew so you can set it and forget it. So far, we've only received one question about membership directly (which we answered immediately, onsite at Porcfest) but we want to answer any questions that might crop up asap for you.

I've outlined some details about the past issues, the new methods, and what this means for our true membership numbers, but it's a complicated topic and there is a ton of information here. We invite both groups to join us for an **Membership Measurement AMA** next week. We'll also have our June Membership stats at that time.

We are dedicated to making sure these numbers are accurate and restoring your confidence in membership data.

Onward,  
Lainie Huston  
Executive Director

### **Our new method is more precise and directly counts qualifying activities vs membership labels**

In the attached report we measured Members, Sustaining Members, and Life Members nationwide and Sustaining Members by state as we approach our October delegate allocation timeframe.

Each of these types of memberships has had measurement issues, some rooted in the way our data is stored, but most in the way membership was counted. There were numerous ways the counting method was imprecise, but the most impactful one was that it was relying on membership labels in our database vs actual donation activity.

Big thanks to our CTO who has now built a rigorous query that directly searches that activity to produce accurate results.

Our [current bylaws](#) define two of our three core levels of members in a complex way. Becoming a Member simply involves signing our Member Pledge, but being a Sustaining Member or Life Member requires an individual to both sign that pledge and meet a donation threshold of \$25 and \$1500 in a year respectively. To count qualifying donors, you need to look at *every* contribution they make across *every* relevant 365 day period. That's a pretty tough technical task for any CRM.



It's not possible to track these two qualifying factors in CiviCRM without significant custom development work. Past teams have heavily relied on close-enough heuristics, complex CiviRules, and manual data adjustments to try to bridge this gap but it's left us with stats that have been off by hundreds of members for the past 25 months that we looked at. That margin of error is just too wide. Our membership deserves the true numbers, so our technical team has found a way to get it done through another mechanism.

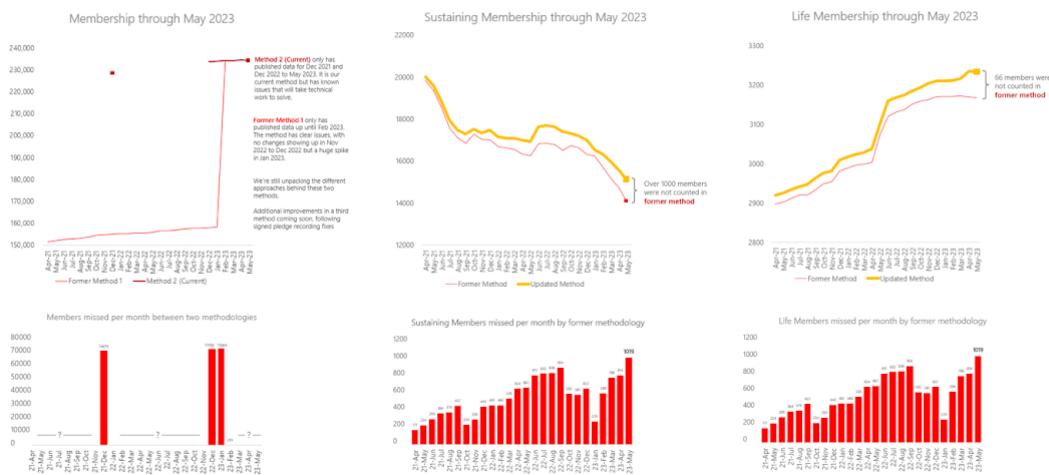
Our latest report is the most accurate one yet, and we will continue to make improvements. Future reports will get even more accurate from here.

### Our membership numbers are higher than previously reported

This surprised our team--when we first noticed issues in our database, we suspected there was overcounting going on. Instead, we found *undercounting* for each of our core three membership types. Here's how that breaks down:

- Total Membership continues to be on the rise, though please note: **we've identified an issue that is reversing member status when existing donors make a new donation** but do not re-check the pledge. This is a poor user experience; a donor should not have to worry about reaffirming the pledge each time they donate. Furthermore, there are no time stamps for signing the pledge, so unlike with donation activity, it's virtually impossible to reverse this mistake across our database, check membership at a specific date in time, and therefore re-measure total membership historically like we have for the other two. This will require a deep fix at the database level, so for now, we've used the past method which puts us at **234,532 Members**. The signed pledge impacts all three levels of members but it's much easier to verify "by hand" at smaller sizes.
- **The past method did not count over 1000 Sustaining Members** in May, a significant 7% of our Sustaining Member base. Hundreds of members have been missing over each of the last 25 months. This fix address donation activity not the exact date a pledge was signed as explained above, but this appears to be the main crux of the issue. At the end of May, we have **15,060 Sustaining Members**.
- **The past method did not count several dozen Life Members on net.** Just two examples: the current database listed our Treasurer Todd Hagopian is a Life Member, but is marked as not having signed the pledge, and Mark Tuniewicz was marked as deceased! We'll be working with each of the individuals who were not correctly labeled as Life Members to make sure they have received their pins and have already fixed those records in CiviCRM. At the end of May, we have **3234 Life Members**.

Snapshot of missing members at three core member levels



### We should still focus on growing donors and members

That said, total Sustaining Membership is still directionally in decline, and we should continue to stay focused on growth. Sustaining Membership ebbs and flows on a four-year election cycle and a two-year convention cycle. Our rate of decline is shrinking, but we'll continue to work on moving this number up instead of down. The main way we'll do that is through our 3 R's: recruiting new donors, renewing current donors, and recapturing lapsed donors.

### Better data for fundraising

Being able to get accurate information on our membership, and more specifically, when memberships start, stop, renew, and lapse, and at what contribution levels--this is *vital* for our fundraising efforts. It helps us reach people at the right time and make them feel special with custom, personalized messaging. Membership cards and other paid advertising like direct mail have not gone out

since we identified this issue. Thank you again to those of you who brought misprinted cards and duplicate/inaccurate mailers to our attention. We have already begun the process to start these up again asap.

With our new mechanism, the membership *label* and some associated data is still inaccurate throughout CiviCRM, but we can now use our new tool to build accurate lists and run analyses on the root activity outside of CiviCRM.

### **Faster membership reports**

This effort to diagnose issues, build the tools to conduct correct measurement, and compile this first report took over 200 hundred hours. We now have a reusable mechanism to produce these reports in record time, and we can distribute membership reports quickly. We will have the June report ready next week.



**May 2023 Membership Report.pdf**

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