

Why 'Member' Means Six Things at Your Association-20261009_155732UTC-Meeting Recording

October 9, 2026, 3:57PM

4h 0m 0s



Julie Rieken 2:58

Great. Hello, everyone.

All right, we are at the starting time. And really glad everybody's here. Why don't we just begin with some introductions? I think that'll be helpful. And I'll start by saying I'm Julie Rieken and

Thank you for being here. I run Association Analytics and I'm here with co-presenter Heather Tran. So Heather, I'll let you introduce yourself.



Heather Tran 3:53

Hi, everyone. So nice to see you all. My name is Heather Tran. I have been at A2 for about 3 years, actually a little bit over three years at this point. And before then, I worked at an association for nurses. So I have been in the industry for a while at this point, and I work a lot on the data model for Atlas.

And I'm sure I have seen many of you in Acumen trainings in the past. So nice to see you all here.



Julie Rieken 4:29

Great. Okay, well, let's go ahead and get started. So today is about one question, and I bet every one of you has been asked this question, maybe by the president of your association, your CEO, and maybe late in the afternoon.

on whatever day it would have been. And the question would be, how many members do we have? And it sure sounds like an easy question, but I think anybody that's here knows that it actually isn't. So I want you to know why it is so hard and what it takes to get a number that you can trust every time. So Heather and I are going to present and share some information that we've learned over time about how people count memberships. And we're going to take a look from the inside out and help you understand how to get to numbers that you can trust. So let's just start with this. There are five questions behind every member. come back to this at the very end, we'll circle back, but there's five questions. So

every member you count and that you have ever reported applies to one of these five questions. And somebody decided each one, even if nobody wrote it down, which I think that's something that happens in a lot of organizations, campfire knowledge.

that people accumulate over time. So let's start with the first question, scope. Which membership types count? Do partners count? Do honorary members? Do retired? Do lifetime members count? Or do those count as a member? What about your hierarchy? If you have a university system, or chapters, is that one member? Or is every sub-organization a member? How do you think about those?

The next one is status. What day does somebody stop becoming a member? When do they expire and when does their grace period end? And we have seen a lot of variation in this particular one with status and you may even have some of that. And of course, timing, members, as of what day? And then the last thing is hygiene. What do you do with duplicates and renewal rows and test records and even your own staff? How do you count those people? So if you want to screenshot this, you certainly can or write it down, but we're going to come back to them at the end. And I'm going to ask you to do one thing with them at the end. And as you know, this isn't theory. So I want to share with you something that actually came through our system yesterday. It was this exact question. So I've anonymized it, but it was one of the questions that came through yesterday. And a customer sent us a list of organizations they expected to see in their member count. And they asked, Well, which ones are in yours, A2 Atlas, and which ones are in ours? Because the numbers don't always match up, and here's what came back. Well, it was a scope-related situation. Our account included some of their partner organizations, the ones that were paying fees,

but their list did not. And plus, there were a couple of membership types that existed in their system, but never showed up in their report. And there was also a hierarchy issue there. They listed, in this particular place, they listed a campus as a row. And campuses most likely belong through the parent.

organization. And then there were some status questions that came through. A few dozen of their organizations were in a grace period. Well, does a grace period count or doesn't it? And it would depend on who you ask. And then there was some hygiene issues. A few of the organizations in their list showed up twice in a file. So a renewal row was sitting next to a current one. So none of those things is a

mistake. And nobody's system is broken, not ours and not theirs, but there is a rule. And maybe it was written down and maybe it wasn't, but those are the kinds of questions they needed to answer and we needed to know about in order to get to the number that we're going to settle on.

So we're still matching this one line by line, but the pattern is clear. This is why this is a complicated question to answer. So here's the part that I want you to hear. Two more of these, just like this one, came through with some questions from our customer base yesterday. And this is not an association, not ours and not yours and not theirs being messy. It's just

everybody's association. So let's just start with why that question is so hard. So here is 1 database. It's the same number of members, the same question, but on the left, we counted everyone whose status says A for active.

which was 4,827. And on the right, we counted everyone whose membership hasn't expired yet, 5,140. So which one is right? If you feel free to, you can put your answer in the chat and see what you think.

And by the way...

Ah, the expiration date.

Yeah. Okay, well, and both depending on the logic that's applied to the filter. So both of these are right. And both of the rules can make sense. And nothing in the data tells you which one is yours necessarily. So think about the question, how many people live in your house? Well, do you count?

This is a good one for me. Do we count the college kid who's home for the summer? Grandma who's there for half the year? And every family member is going to answer it differently and nobody's necessarily wrong. So if you look at the bottom, we looked at 109 association setups and the simplest association needed only 34 lines of rules to answer how many members. But the most complex organization out of those 109 needed 308. Same question, 9 times the rules, and it's the little cases that pile up, the lifetime member who never gets an invoice, so the system might think that they quit, or the staff person who's on the roster but never really was a member.

So why is it so tangled? And it's because every association is built a little bit differently. So I'll show you what I mean.

Okay. Every association has a shape. And I'm going to use a gym because we all understand a gym membership. So let's just talk about the shape of all of your organizations. Let's start with what is a peer family. Well, you can buy a gym

membership or you could just buy the pool membership.

Both of them are real memberships and both of them count. It's 2 front doors into the same house when we talk about a peer family. In A sub-family, a yoga pass, a yoga only pass is something you can also buy, but it's narrower. It's just the specialty. And you might list just the yoga pass people separately than you do from the full members.

A rider might be a locker rental. You can only rent a locker if you're already a member. It's an add-on, and nobody counts lockers when the boss asks how many members you have.

a placement. Your home gym club was assigned to you. You didn't buy it. In your world, that might be a chapter. And then there's the other association. The juice bar in the lobby, it takes payments at the same front desk, but it isn't the same as the gym. A lot of you collect dues from another group, and those people live in your systems, but they're not your members.

So now look at the box on the left. Even once you know who belongs, you still have to ask, are they a member right now? Well, we say that current means active, only active. Someone in their grace period isn't necessarily current, and someone who lapsed isn't. And we figure that out from the dates on their membership, not from a check box that somebody forgot to uncheck. And your association may have elements that are similar to the gym analogy. And if you can't see the shape, you can't count it. So here's what a real shape looks like. And this is a great, is there a benchmark date that would apply? Yeah, we're going to talk about that. So I'm going to let Heather take the next slide here.

And she's going to talk through the shape of an organization.

And why it matters.



Heather Tran 13:09

Thank you, Julie. I was just writing in the chat a response to what other people said about the expiration versus the status and which one is correct. And I think that the responses here are correct. Diane said it depends on the logic applied and filtering. Melissa said it depends on what the status is.

And so in Atlas, what we do is, you know, a blanket status equals A for current member would be incorrect, but a blanket term not yet expired would also be incorrect. So in Atlas, we use the term derived status, but specific status labels like inactive, deceased, and dropped can override a term derived active term.

So for example, we might have an association who creates new terms, even though the new term has not been paid yet. And if they don't pay for the new term, they get the status of dropped, but the term is still there. So the data model has to know to not count that unpaid dropped term as an active term, even though it looks the same if you to other terms if you don't look at the status itself. So it's all taken into consideration with each other.

And so when it comes to how do we look at the different aspects of your membership structure, we look at your headline first, like your primary membership. So the status and term derived configurations that I just talked about reflect in your primary membership here. So

This would, for this demo synthetic tenant, the current member count is 3,427, and all of them are individuals. Now, some of you might have organizations who are members. Some of you might have a flow down who are members. And then those are all kind of counted in like a headline count.

Now, you might also have a peer family. So we settled on terms like family, like peer family and subfamily, because I had never seen an association use the word family. And I wanted a term that nobody else would, I wanted a generalized term that could be used for any association that wouldn't conflict with an existing vocabulary they already had. So we have a peer family, and a peer family is a membership that can be held at the same time as the primary family or the headline family. So we have many associations who have

Multiple peer family memberships that a person, or more typically an organization, can be a member of.

All right, the next one, we have something called a subfamily. So there are some associations you'll find where they have some sort of specialty membership that you can actually hold separate from the headline membership. So this could be, you know, related to a practice specialty, and related to any aspect where maybe the person or organization is not interested in the headline membership, but has a specific sort of niche need that might be reflected in something like a subfamily.

And the next one, so we have a concept called writers, and these are like paid add-ons. Typically, you might call this like a chapter or a division. And it means that this creates a term, like you have actual terms for these writer memberships. And they're called writer because they write on a headline membership.

They're not found by themselves, like the subfamilies might be.

All right, and then next we have a placement. So as opposed to a writer, a placement might also be something like a chapter, but the member doesn't actually purchase a membership to it. They are just assigned there, typically based on a geography or it might be based on

Like if they filled out something that said, you know, I am interested in this like specialty within our industry and then they might be placed in a specific assigned chapter that is not creating terms in your database.

All right, and then the last one, we actually see some associations that will have memberships from other associations. Typically, it might be a parent association to the association itself, and those terms will be in here. They might even collect dues for the other association, but they can't be counted as

the headline membership count, the dues can't be assigned or attributed to the association itself. And so we can see these in the system and we are showing like the other association to say like we see that this exists in your data to make you and anyone who is using Atlas aware.

that this information exists in your database, but that it is held separately from your actual numbers.

And the boxes don't add up. That is, you know, on purpose. You don't want to count every single membership a person can hold as a member. We want to count our unique members for the headline members.



Julie Rieken 18:49

That's true. So no one's making messy data, but I think every one of you serves a special kind of group. And groups grow organically and inorganically in the way that's important. And it's going to mean that some of those different subcategories will be parts of the organizations that you work for.

And that's why it's a little more complicated to just answer the question of who, how many members do we have? So imagine this, here it is. Here's how you get to that answer today. So somebody sends you a message late in the afternoon and says, oh, quick question, how many members do we have? And then you find out that, oh my goodness, well,

I can't export the report. I need somebody that has access to it. So tomorrow you get in and there's three reports and they all kind of look right, but you need to go find the person who knows the rules because you know two of the three, but not the

third rule. And every association has that person and some of you on here might be that person, the one that's the expert.

And that person, whether it's you or somebody else, may have been there for 15 years, but what if they're out till Thursday? So by day three, you're doing math in a spreadsheet and you've been interrupted a couple of times and finance sends a number and it's different. And my guess is some of you have lived this, have lived this. And I know that you probably have because when I was serving on the board of an association, this was something that I lived to. So this is just a made-up timeline, but I think it's, you know, it can be very real for each of you. So this can be a challenge just to answer that question.

So, here's the part that that that worries me the most: even when you do it right, that number can fool you. So, this is this is something that Heather and I can both speak to. We'll tell you about one of our one of our customers here, again, anonymized, but this was this was a mistake. So,

last number, or last November, an association's membership list was captured. And on that day, when they captured how many members, it was everybody whose term ran through December 31st, and those people counted as active. But then when December 31st came, about 37

1,800 terms ended. And that's normal because that's actually what happens for them every year. But then in May, a chart compared that old November list to today, and it called all of those people lapsed. So it was saying about 92,000 people had lapsed against around 6,500 joins.

And that was kind of a heart attack chart. So there was no error message, no warning. The question was the right one, but the setup was wrong. So it's like looking at a screenshot of your bank balance from November and then comparing it to today and panicking. You forgot all of the bills that came in in December. So a person did catch it.

And here's why I'm telling you. We fixed it in one place, and now every chart and every person gets the same fix automatically. But without that single place for the rules, the fix could live in somebody's head. And somebody might say, oh, don't forget, remember to use that snapshot date. And so we want somebody and those rules to be codified and written down every time. And Heather, I'm sure you've encountered this too. I don't know if there's anything you wanted to add to this story.



Heather Tran 22:19

Yeah, I would say one of the most important things that we are doing when it comes to Atlas is making sure that...

how we decide what a number says and what is showing in a chart is accurate, obviously, but also making sure that we are responsive to like when numbers show up incorrect, that the fix is not just something that only one person knows how to do. which is a problem that you have probably all run into in your own associations and in any other, you know, career that you've worked in. Sometimes the knowledge can stay with a person and we want to build institutional knowledge not just for association analytics, but also for associations in general and all of you so that you can trust the data that you're looking at.



Julie Rieken 23:16

That's right. Heather, this one's YouTube. Uploads and billing. This one's fun.



Heather Tran 23:20

Yes, yes. All right, so these are two different traps, and it's about everyone's favorite thing, the first one, which is switching to a new AMS. We have had several clients in the past and several clients right now who are in this process.

And there are some data problems that can occur when you switch to a new system, one of which is that sometimes it can make all of the members look like they joined in one year. And that would be the year that you transferred to the new AMS. And sometimes the actual join date will be saved somewhere in the database that is in a different spot than looking at the actual terms and sometimes it's not. And we need to, when we are showing you like joins by year, we do a lot of digging to figure out do you have a real join date for these members or are we just going to hit this wall for a lot of your members where it looks like they all joined.

in the day, in the year that you switched to a new AMS.

And if it does show that wall, then we take out the members who just show up as being in what we call like the wall, like the new AMS wall, because otherwise it will give you like incorrect numbers on join dates.

And then the second one is about billing. So you can have two associations on the

same vendor who might have different rules about counting members. And so Association A here might count who has paid for their term. And an Association B might count who was billed for their term, even though they might have the same exact, you know, sort of process for billing and process, the same sort of process for taking in payments, but they disagree on, you know, what do our, what do we want our numbers to mean? And so this is something that we handle in Atlas with the ability for anyone, any of you, to implement your own sort of counts if they are different than how the standard sort of definition is of what a member is.



Julie Rieken 25:52

Great. So how do you, Heather, how do we get to a math standard we can trust? And this maybe goes to Lisa's question.



Heather Tran 26:02

This is, ohh, the benchmark day, yes, so, uh, yes.



Julie Rieken 26:04

Yeah.



Heather Tran 26:08

All right, so you need a standard that you can depend on. And there are quirks in the data that make consistent math difficult sometimes. And every, you know, vendor can be a little bit different. Every AMS vendor, every association can be a little bit different. And so we tried to standardize our product definitions based on what we see in the association industry and the meaning of the standard we are trying to define.

So for example, when it comes to the renewal rate, you likely know that there's a difference between when a member pays for their renewal and when their effective date is for their new term. And you'll find that you might want to have two different kinds of renewal rates here. So one of them would be you know, based on the effective date, you might see this chaining of renewals, you know, unbroken chain of renewals for multiple years, which is great. If you looked at the payments, maybe you would see that some of your members are showing as like this chain renewal, but they're actually renewing like one to two months late.

every time.

And so some associations will backdate that payment. Well, not really backdate the payment, but when they get the payment, they'll backdate the membership term to like two months earlier, like to January 1st or, you know, whenever they count a membership term as starting. And others might say, okay, like you start in the month that you paid.

And so we are using an on-time renewal rate for associations where that is possible. We also find sometimes that not every association can, and vendor can link the payment to the actual term that it's paying for.

So that's another sort of quirk of data that we have to consider when we are defining a renewal rate or defining any number really is, does the data support the, like, is the ability within the data to support what we want the numbers to mean?

And I think that's really important when you were considering how are your business rules, you know, being defined even internally, like when you, you know, talk internally, when you're considering what is your AMS capable of, if you're considering moving to a new AMS, to think about all of these things that you want to know about your members.

but that perhaps you are kind of overlooking because the data isn't being captured in a way that would allow you to analyze member behavior in the most comprehensive manner. And so there's a lot, but I think that, you know, what you want to do is

make sure that everyone sort of agrees on the standard that you are using. And then, you know, we have done our best to apply association industry standards, and then also allow you the opportunity to look at your data in the way that is familiar to you with like Team Atlas and My Atlas as well.



Julie Rieken 29:30

For sure, OK.

This is another interesting point. A lot of you probably use different AMSs, but just because you use the same AMS doesn't mean that the data is the same. This one's a little technical, but one of the things that's important is each of those systems has fields, and how each of you uses those fields could vary.

So for example, user ID D1 could mean chapter code for one association. And another association might use that user field D1 as a region. So depending on how people use their AMS, those columns could be a little bit different. And that can

create some complexity in data too, just to make sure you're using the right columns. And then I want to introduce the next thing here, which is because of those things and because you want to have a defined standard, you want to know which columns mean which things and understand your business rules. Now I want to introduce AI on top of that.

You're definitely going to want to think about, do you have those? So any product that you use, when you think about asking AI questions about it, it's going to need to know what those special situations are for your organization. What is the shape?

When do you, what are your dues cycle counts?

deferred? Is it in grace? You're going to want to make sure that each of your definitions counts so that when you put AI on top of it or any product, whether it's your AMS or ours or anybody else's, when you ask that question, you have a definition for what it means.

Otherwise, all of us that have used AI know, well, it's going to come up with what it believes. And if it isn't a standard, what it believes on Tuesday might not be the same as how it configures things on Wednesday. So you need to have your AI and your data model conformed into a set of predictable.

predictable buckets, predictable fields, so that when you're asking those questions, when you ask, you're going to get the same number twice, so that you can trust the things that are coming out. And one of the things AI does so well anymore is it loves a big spreadsheet.



Heather Tran 31:48

We.



Julie Rieken 31:52

as long as that spreadsheet has good rules in it so that it can come back and not reinvent it every single day. So that's an important thing for you to know when you're thinking about using any products that have AI in it. Make sure there's a conformed data model so that your standards are set and it knows your unique rules, whether that's

how you calculate your grace period or what your window is for counting or your billing time frames are. Those are really important things to know.

Heather, this one is you.



Heather Tran 32:26

Yes.

Right, so benchmarking. So we want to make honest comparisons. And A benchmark without a shared standard is 2 numbers that share a name. And we want to make sure that the meaning of the two numbers is the same. And you might want to, you know, we hear a lot from associations.

And I have heard a lot, you know, when I've been on, you know, trainings with you all, that your board is interested in knowing how do you compare against similar associations. And that can be really difficult in this industry because there are not that many shared, there's not that much.

conversation or shared understanding of like what a number should mean. There is some benchmarking out there. We have some of it in Atlas ourselves.

And we are, you know, we really want to help you all help contextualize your association and your data. And to do that, we have to make sure that the numbers between the associations are the same, calculated the same way. And so, bless you.

And so, for example, like when employer coverage is counted correctly, you'll see your standardized figures and then a published partner benchmark with directional context, and as more of as more employers and associations join.

and they can base their numbers on these identical definitions, will have more peer comparisons in the association industry. And some associations, you know, you might want to say like, well, we want to make sure we're not counting, say, float on members in our counts of members. And we want to make sure maybe another association does include them.

And so we have to, you know, normalize some of these figures to make that comparison honest across associations so that you have a really, you know, true blue look at how your numbers are doing and then also how they compare to other associations so that you can go back to, you know, your board or whoever it is that You know, you need to have a frank conversation with about your numbers and about your association standing.

and, you know, come up with a plan to either, you know, close a gap or anything else that has to do with like your strategic plan, where you need to make an argument for, you know, why you need specific, you know, programs or initiatives.

And it's important to have data that can back that up and not just internal data, but also data that compares you to other associations. And so that you can say like, well,

you know, hopefully in the future, you'd be able to say, well, another association maybe did this and got these numbers. And that's, you know, the goal is to increase also sharing of.

of understanding across associations and not just keep everything internal.

All right, and so, yeah, this is mine too.



Julie Rieken 35:36

That's right.

Mhm.



Heather Tran 35:41

But the standard doesn't mean that you have to lose what makes you special, right? Your definitions can live in the data as well. And you can see here that we are looking at the same association with two different ways of looking at the data. So our standardized view is

is that a member counts up until the end of their term. And this makes them comparable with their peers. Now, the Association's bylaws might say you have to count members up until like 15 months past the end of their term date. And they would still count current, like they would look at a count of current members up to 15 months past the term end.

And both of those things are possible in Atlas. They would live in different places in Atlas, but you don't have to lose that ability to analyze your data based on your specific business rules.



Julie Rieken 36:41

Yep. So, um, real name.

Real story, no, not real name. Real story, not a real name. Yeah, so this is just a story about a customer that we have here. Jordan is not an analyst and data is not Jordan's job. Jordan did ask Atlas, our A2 Atlas, more than 400 questions in seven weeks and built 6 dashboards.

But there was one, one of those questions really stuck with me. And it was Jordan's membership system, showed one revenue number for an event. And we, our Atlas was showing something different. So Jordan asked, where's the difference? And Atlas walked through it and it was, the gap was about 4.6%. So team viewing packages were in one number and not the other. And the two reports

were pulled on different days. And then, and this is how my favorite part, Jordan decided how the Association should count it. Not us, we didn't decide that. We didn't, Jordan did though.

So, Heather, let's play this out. So for anyone who, you know, who has done these kinds of counting before, maybe what you can answer this or just at least answer it in your own head. What might what happens in your association when you when you ask someone for a number or someone asks you for a number?

And just thinking a little bit about AI, how have things changed now that now that we have that, Heather? How, you know, what, how are people thinking about this if they're not data people and now that they've got AI on top of some of these numbers?



Heather Tran 38:27

I think one of the...

sort of blocks to asking numbers is the availability of the number and knowing how to work with it. And when that data is just in sort of raw form with no data model helping it, it can be difficult to trust that the AI knows what it's doing.

And I think that when you put this data model and conform the data into it, and then also have the ability to query the raw data and join it to a common model, it makes it much more trustworthy. And you have the ability as a non-analyst to ask a whole bunch of questions that previously maybe you would not have wanted to, you know, annoy your coworker with 400 plus questions in seven weeks, but AI is not going to get annoyed with you and you can ask as many questions as you want and build something that maybe you always wanted to have.

but could never have in the past because there were too many barriers to getting the numbers, to asking someone else to spend their time to get those numbers for you. And I think this makes the turnaround between wondering about something and getting an answer to it much, much, much faster.



Julie Rieken 39:47

Agreed. Great. Okay. We said we were going to come back to the very last topic and we're going to do that and wrap things up and then open it up for questions if there are any. So remember the five questions from the start. And here's the one thing that, you know, maybe you want to think about. Maybe pick the member count that you give your board, just that number, and get the

number, get the people who report member numbers in the same room, maybe membership and finance, and answer these five questions and write them down. You know, that's it. It costs you nothing. You can do it next week. Some of these questions could be easy.

One or two might not be easy, and that's useful because the hard part is where your numbers have been drifting apart or how different groups answer them. So once it's written down, it's going to stop living in just one person's head. And that colleague who was out, the one, the 15-year colleague, even if that's you, that person who's out,

This is a way for you to help thinking together about how do we answer the question of how many members do we have? So these are the two questions to take back, I would say. Ask your own team, what definition are we using? And is it the same one that we used last year? And if it changed,

Maybe your trend might be the definition moving, but not your members. And second, ask any tool you use, including our tool, when your number is different from mine. Can you show me the rule that made it? And can I change it? And if...

it can't show you the number, then it's hard to trust the answer. So are any of these pretty difficult for you to answer? Is there anything anybody wants to talk about?

Scope, hierarchy, status, timing, hygiene? And if not, just want to thank you for your participation today. That was the content that we'd hoped to cover, was just to talk a little bit about how.

different organizations, think about how they count memberships. So I'm just going to stop there, thank everybody, and let anybody ask questions if you have them.

I'm just watching the chat to see if anybody's got them.



Heather Tran 42:20

This.

Hey.



Julie Rieken 42:24

Sorry, I don't mean to laugh, Kelly. It's real.



Heather Tran 42:27

Yes.



Julie Rieken 42:29

And they don't, maybe going back to the first slide, they don't add up on purpose because each of those different subgroups really is different. No, it's not that you don't know what you're doing. It's that they count in different ways. That's real. Yeah.



Heather Tran 42:47

For the sake of the recording, what Kelly said is I feel like every time someone asks about the count, I'm like, well, it depends. Which is very, yes. I feel that.



Julie Rieken 42:55

Yeah.

For sure.

Okay, well, for those of you that have a three-day weekend, have an excellent one.

Thanks for joining us on a Friday. If there's anything we can do to help you, or if you just want to have a conversation about ways that we think about it and how we think about a conformed model, or

You just want to talk about this situation and how you share it with your board.

We're really happy to engage with you on that. So thanks for joining us.



Heather Tran 43:35

Thank you so much, everybody.