



## Essential Member Reports Every Association Needs in YourMembership

Tracking membership data is one of the most important ways associations measure success and make informed decisions.



As an Executive Director, you're expected to walk into board meetings with clear, reliable answers to critical questions:

- How many new members joined this year?
- What percentage of members renewed?
- How many lapsed members do we need to re-engage?

On the surface, these sound like simple numbers. But in **YourMembership (YM) association management**

**software**, getting accurate data isn't always straightforward. Many associations discover that the "out-of-the-box" reports don't align with their definitions of new, renewing, or lapsed members. Without the right setup, YM can't tell the story your board needs to hear.

If you have ever found yourself second-guessing the data, you're not alone. Let's walk through the **three essential membership reports** every association needs, along with common pitfalls and solutions.

## 1. New Member Reports

On the surface, “new members” seems straightforward. But in YM, a *new member* is defined as someone who joined either in the current calendar year or within the past 12 months of the report run date.

That might not match your definition. For example:

- Do you consider members who **rejoin** after a lapse to be “new” or “renewed”?
- Do you want to distinguish between **first-time members** and **returning members**?

These details matter. Without clarity, your new member reports can quickly become unreliable, leaving staff frustrated and leadership without accurate figures.

**Best Practice:** Define what *your association* considers a new member, then create custom reports in YM that reflect that definition.

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## 2. Renewal Reports

Renewals can be even trickier. YM typically looks for one main criterion: **has this record been a member for at least one year or more?** But associations often add their own nuances:

- Do you include **subaccounts** in your renewal data? (YM dashboard reports and Directory Search Queries don’t always capture these.)
- How do you treat members who renew *early*, before their one-year anniversary date?
- Do you allow members to renew within a certain grace period and still count as a renewal, or do you mark them as lapsed?

Without customization, YM’s predefined reports may not align with your association’s renewal rules.

**Best Practice:** Build a renewal report around your unique criteria. That way, you can present accurate renewal rates to your board and make data-driven decisions about retention strategies.

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### 3. Lapsed Member Reports

Finally, lapsed members—the group associations most want to win back. In YM, lapsed members are those who don't renew within their expiration or grace period (usually 3–12 months). However, YM's predefined lapsed reports often create confusion:

- **Duplicates in membership history** can inflate your lapsed counts.
- Reactivated members may appear multiple times, making it hard to sort true lapses from active members.
- Membership history entries may not always be reliable.

**Best Practice:** Define your association's lapsed member criteria clearly, then build a custom report that filters out duplicates and inaccuracies. While YM provides baseline data, custom reporting ensures you get a clean, trustworthy list.

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#### Where Reporting Breaks Down

The challenge isn't just about running a report. It's about how the system is designed to capture data in the first place.

Recently, we worked with a client who was struggling to deliver consistent membership numbers to their board. Every month, staff spent hours manipulating data, removing duplicates, and second-guessing whether their counts were accurate.

The solution wasn't just building custom reports. We started by creating a **process to capture data correctly**:

- Designed **custom fields** to track member status more precisely.
- Established **staff workflows** to ensure information was updated consistently.
- Built a reporting process that matched the association's unique definitions of new, renewing, and lapsed members.

Only then did we build the reports. The result was a system that delivered reliable data at the click of a button. No more manual cleanup, no more scrambling before board meetings.

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## Why This Matters for Executive Directors

For leaders like you, data accuracy isn't about spreadsheets; it's about **strategy and credibility**. When your reports are reliable, you can:

- Present membership trends to the board with confidence.
  - Identify opportunities for growth and engagement.
  - Free your staff from hours of manual work, so they can focus on serving members.
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## Final Thoughts

YM is a powerful platform, but it doesn't come pre-configured to match every association's needs. To get accurate membership reporting, you need both the **right system setup** and the **right reports**.

At Starkweather Association Services, we specialize in helping associations like yours build reporting processes that save staff time and provide leadership with the insights they need.

If you've been struggling with **membership reports in YourMembership**, you're not alone. Our team at **Starkweather Association Services** has guided many associations through this process, helping them save time and improve accuracy.

👉 **Need help creating reliable member reports in YM? Book a free consultation.**

