

## Membership Statistics

Created 4-26-2019

This guide documents the searches requested by Membership to use in compiling various statistics. You can click on each search to jump to the section describing that search in detail.

- [Total current members \(as of today's date\)](#)
- [New members who joined between \(specify past start & end dates\)](#)
- [2nd year members who extended to a 3rd year between \(specify past start & end dates\)](#)
- [2nd year members who graduated between \(specify past start & end dates\)](#)
- [3rd year members who graduated between \(specify past start & end dates\)](#)
- [2nd year members whose membership will expire between \(specify future start & end dates\)](#)
- [3rd year members whose membership will expire between \(specify future start & end dates\)](#)

Note that the first five tests are only valid for today's date or for past dates but the last two are forward looking and are only valid for dates in the future.

New Members > Saved searches have been generated for each one of the statistics above. They are all located at the top of the Members > Saved searches page to make them easier to find and use.

For most of the searches there are alternate searches that can be used instead of the saved searches depending on your preference. The majority of these use WA's Email Log search function. These can also be run as a double check against the results from the saved searches. One benefit to using WA's Email Log search function is that you are assured that none of the emails sent to your personal email address will be missed because of them going into your spam or trash folders, or simply getting lost.

Note that you can export most of these search results into Excel spreadsheets so that you don't have to copy stuff like names and/or email addresses manually, which is always prone to mistakes.

Before describing each search in detail, it may be helpful to review the following "background" info to assist in understanding the searches.

- Wild Apricot has four "membership levels"; Newcomer Members, Extended Newcomers, Alumni (formerly called Friends of Newcomers), and Admins (formerly called Webmasters). (Note: Newbies is *not* a membership level in WA; it is an artificial subset of the Newcomer membership level.)

- Members have various membership statuses associated with their membership in the Club; Active, Lapsed, Pending and Archived. We need to make sure only Active members are counted in our statistics gathering.
- Two key dates for some of the searches we will use are the Member Since date and the Renewal due date.
- New members join at the Newcomers membership level. After submitting an application, their membership level is set to Newcomers and their status is set to Pending. If they don't pay online, it remains Pending. Upon paying, their status is changed to Active and their Renewal due date is set to two years from the payment date. 30 days and 15 days before their Renewal due date, they receive emails with the date their membership will expire along with an offer to apply for a third year extension (if they are qualified). If they don't do anything, they receive a Graduation email thanking them for their service and they are automatically transitioned to the Alumni level. Because there is no payment required in becoming an Alumni, the Renewal due date does NOT get changed.
- When Newcomer members apply for the third year, upon payment their renewal due date is set to one year from the date they pay, NOT one year from their original renewal due date. (Note: This renewal due date must be adjusted manually to make sure that they are not short-changed because they paid early.) On their renewal due date, a Graduation email thanking them for their service is sent out and they are automatically transitioned to the Alumni level. Because there is no payment required, the renewal due date does NOT get changed. There are currently no emails sent out prior to the Graduation email.
- Because the Alumni membership level is “free” and there is no payment, the system does not update the renewal due date. Two years (730 days) after the renewal due date, an Alumni’s membership record is automatically Archived in order to keep the overall database at a reasonable size since archived records do not count against the overall database size limits for each WA subscription tier. Archived members can be unarchived manually by a membership administrator or a webmaster, and also by the Alumnus simply logging on and “renewing” his or her “Alumni membership”. In a recent change, the Renewal due date for any Alumni who has registered for an event that is officially opened to Alumni is automatically updated to the date of the last event that the Alumni has registered for. The purpose of this change is to keep “active” alumni from falling off the invite list by being blindly archived after 730 days.

Each search listed above will now be described in detail in the following pages. If you encounter problems with any of the results of these searches please contact the VP of Technology.

## Total current members (as of today's date)

Note that this statistic is only applicable the day it is looked at, since this number can change daily. If the desire is to report this statistic to the board for the actual number of members at the *end* of the previous month, then this Members Summary must be looked at on the last day of the month.

There are two ways to gather this statistic. The easiest is to simply look at the [Members Summary page](#) and then add the Active column numbers for Extended Newcomer and Newcomer Members together. Note that this totals 715 in the screenshot below.

The screenshot shows the 'Members' tab selected in a navigation bar. Below it, the 'Summary' link is highlighted with a red box. The main content is a table titled 'Member list' with various search and export options at the top. The table has columns for Level, Total, Active, Renewal overdue, Lapsed, Pending, and New in last. It includes filters for New, Renewal, Level change, and time periods (7 days, 30 days). The data shows counts for Admins, Alumni, Extended Newcomers, and Newcomer Members. The 'Active' column for Extended Newcomers and Newcomer Members is circled in red, and the total for these two categories is 715.

Level	Total	Active	Renewal overdue	Lapsed	Pending	New in last	New	Renewal	Level change	7 days	30 days
Admins (formerly Webmasters)	<a href="#">72</a>	<a href="#">72</a>	-	-	-	-	-	-	-	-	<a href="#">1</a>
Alumni (formerly Friends of Newcomers)	<a href="#">519</a>	<a href="#">512</a>	<a href="#">515</a>	<a href="#">7</a>	-	-	-	-	-	<a href="#">1</a>	<a href="#">15</a>
Extended Newcomer	<a href="#">115</a>	<a href="#">115</a>	-	-	-	-	-	-	-	-	-
Newcomer Member	<a href="#">603</a>	<a href="#">600</a>	<a href="#">1</a>	<a href="#">1</a>	<a href="#">2</a>	-	-	-	-	<a href="#">8</a>	<a href="#">29</a>
Total	<a href="#">1309</a>	<a href="#">1299</a>	<a href="#">516</a>	<a href="#">8</a>	<a href="#">2</a>	-	-	-	-	<a href="#">9</a>	<a href="#">45</a>

An alternate way is to use the saved search named [\\* Total current members](#). Click on this link to go directly to this search if you are already logged in as an admin.

As is true with the Members Summary above, this search gives valid numbers only for the day it is run. Note that the total number of members shown in the screenshot below is the same as the results from the Summary List shown above.

One advantage to using this search instead of the numbers provided on the Summary page is that you can export the results to a single spreadsheet that can then be searched to do a sanity check and perhaps eliminate "artificial" members that have been created for testing purposes.

Dashboard Contacts Website Events **Members** Store Donations Finances Email Settings

Summary List Saved searches Levels Groups Membership fields Member emails Card Polls Other settings

Add member Export Email members

**Member list** ([Summary](#) | [Keyword search](#) | [Advanced search](#) | [Saved searches](#))

Search name: **Current members**

Layout: Default layout

Sort by: Last name

Match **all** of the following criteria

**Add criteria**

Member status: is not  Active  Lapsed  Pending - Renewal  Pending - New  Pending - Level change [remove](#)

Membership level: is not  Admins (formerly Webma...  Alumni (formerly Frien...  Extended Newcomer  Newcomer Member [remove](#)

Membership level: is not  Admins (formerly Webma...  Alumni (formerly Frien...  Extended Newcomer  Newcomer Member [remove](#)

Member status: is not  Active  Lapsed  Pending - Renewal  Pending - New  Pending - Level change [remove](#)

Search [Save search as:](#)  Save

Records found: **715**

Show: **1 - 50**

Member	Membership	Member status	Email	Last login
--------	------------	---------------	-------	------------

## New members who joined between (specify past start & end dates)

Since all new members receive an email welcoming them to the Club, we can quickly determine how many members joined between two dates in the past by using the simple search function contained within the [Email Log search page](#).

Select the date range and search for “membership activated”.

If you want the number of members who joined in a previous month, select the first and last days of the month you are interested in. Be aware that running this search in the middle of a month only gives results up to the day this search is run, so to be accurate you must run this search no sooner than the first day of the following month.

The screenshot shows the 'Email log' section of a software interface. At the top, there's a navigation bar with links for Dashboard, Contacts, Website, Events, Members, Store, Donations, Finances, Email (which is selected), and Settings. Below that is a secondary navigation bar with links for Emails, Templates, Log (selected), and Settings. A green 'Export' button is on the left. A red box highlights the date range selector, which shows '1 April 2019' and '30 April 2019'. To the right of the date range is an 'Apply' button and a note about open/click tracking being ON with a link to settings. Below the date range is a 'Filter by' dropdown set to 'All' and a search input field containing 'membership activated', also highlighted with a red box. To the right of the search input is a note that 'Records found: 31'. The main area is a table with columns: Date, Type, Email details, To, Opens, Clicks, and Delivery. The table lists five rows of data, each corresponding to an automatic email sent on April 25, 2019, to different recipients. The 'Email details' column for the first row shows 'Membership activated at {Organization\_Na... Member activation email Newcomer Member'.

Date	Type	Email details	To	Opens	Clicks	Delivery
April 25, 2019 3:29 PM	Automatic	Membership activated at {Organization_Na... Member activation email Newcomer Member	Burke, Ellen Copied to admin(s)	Opened	Clicked 1	Delivered
April 25, 2019 2:44 PM	Automatic	Membership activated at {Organization_Na... Member activation email Newcomer Member	Ortiz, Ana Copied to admin(s)	Opened	-	Delivered
April 25, 2019 2:37 PM	Automatic	Membership activated at {Organization_Na... Member activation email Newcomer Member	Jaworski, John Copied to admin(s)	Opened	-	Delivered
April 25, 2019 6:34 AM	Automatic	Membership activated at {Organization_Na... Member activation email Newcomer Member	Aldredge, Brett Copied to admin(s)	Opened	-	Delivered
April 23, 2019	Automatic	Membership activated at {Organization_Na...	Ellis, Jillian	Opened	-	Delivered

Note: this search for April 2019 was “contaminated” by 3 emails that were sent to “Alumni” who recently joined the database. For May 2019, these Alumni emails will no longer appear in this email log search so future results should correspond with the results from the saved search described below.

Alternatively, there is a saved search named [\\* New Members who joined](#) and that search is shown below. Click on this link to go directly to this search if you are already logged in as an admin.

Note that you *must* edit the dates before you run this search since the dates that come up as defaults are the dates used when the search was created. As above, you can also export these results into an Excel spreadsheet.

The screenshot shows the 'Member list' search interface. At the top, there's a navigation bar with tabs like Dashboard, Contacts, Website, Events, Members, Store, Donations, Finances, Email, and Settings. Below that is a sub-navigation menu with links like Summary, List, Saved searches, Levels, Groups, Membership fields, Member emails, Card, Polls, and Other settings. There are also buttons for Add member, Export, and Email members.

On the left, there's a search form with fields for Search name (set to 'New members [date range]'), Layout (Default layout), and Sort by (Last name). A red arrow points from the text 'Change these dates' to the date range field.

The main search area has a heading 'Match all of the following criteria' and a '+ Add criteria' button. It contains several filter sections:

- Member status:** Set to 'is not' (radio button selected). To the right is a list of status options: Active, Lapsed, Pending - Renewal, Pending - New, Pending - Level change, Admins (formerly Webma...), Alumni (formerly Frien...), Extended Newcomer, and Newcomer Member. Each option has a 'remove' link next to it.
- Membership level:** Set to 'is'. To the right is a list of membership levels: Active, Lapsed, Pending - Renewal, Pending - New, and Pending - Level change. Each option has a 'remove' link next to it.
- Member status:** Set to 'is not'. To the right is a list of status options: Active, Lapsed, Pending - Renewal, Pending - New, and Pending - Level change. Each option has a 'remove' link next to it.
- Member since:** Set to 'on or after' with the value '1 April 2019'. This field is highlighted with a red box.
- Member since:** Set to 'on or before' with the value '30 April 2019'. This field is highlighted with a red box.

At the bottom, there are 'Search', 'Save search as:' (with a dropdown set to 'New members [date range]'), and 'Save' buttons. A red box highlights the text 'Records found: 28' at the very bottom.

## 2nd year members who extended to a 3rd year between (specify past start & end dates)

Since all members who extend their membership receive an email welcoming them to the third year, we can quickly determine how many members joined between two dates by using the simple search function contained within the [Email Log search page](#).

Select the date range and search for “level change”.

If you want the number who extended in a previous month, select the first and last days of the month you are interested in. Be aware that running this search in the middle of a month only gives results up to the day this search is run, so to be accurate you must run this search no sooner than the first day of the following month.

The Email Log search for the month of April 2019 yields the results shown below:

The screenshot shows the 'Email Log' section of a software interface. At the top, there are navigation links: Dashboard, Contacts, Website, Events, Members, Store, Donations, Finances, Email (which is highlighted in blue), and Settings. Below these are sub-links: Emails, Templates, Log (highlighted in red), and Settings. A green 'Export' button is visible. A red box highlights the 'Log' link and the 'Records found: 5' message. The main area displays a table of email logs for April 2019. The columns are: Date, Type, Email details, To, Opens, Clicks, and Delivery. The data rows are:

Date	Type	Email details	To	Opens	Clicks	Delivery
April 27, 2019 6:29 AM	Automatic	Membership level change completed at {0 Membership level changed Extended Newcomer	BOUBEL, PAMELA Copied to admin(s)	-	-	Delivered
April 26, 2019 3:20 PM	Automatic	Membership level change completed at {0 Membership level changed Extended Newcomer	Boubel, Gary Copied to admin(s)	Opened	-	Delivered
April 24, 2019 7:42 AM	Automatic	Membership level change completed at {0 Membership level changed Extended Newcomer	Guaccero, Carol Copied to admin(s)	Opened	-	Delivered
April 08, 2019 11:48 AM	Automatic	Membership level change completed at {0 Membership level changed Extended Newcomer	Renfrew, Susan Copied to admin(s)	Opened	-	Delivered
April 02, 2019 11:52 AM	Automatic	Membership level change completed at {0 Membership level changed Extended Newcomer	anderson, kristi Copied to admin(s)	Opened	-	Delivered

A saved search that yields the same results is called [\\* 2nd yr Mbrs who extended](#). Click on this link to go directly to this search if you are already logged in as an admin.

For this search you must specify both a beginning and end date and then click on Search:

The screenshot shows the 'Member list' search interface. At the top, there's a search bar with '3rd year extensions' and dropdown menus for 'Layout: Default layout' and 'Sort by: Last name'. A red arrow points from the text 'Change these dates' to the date range section. Below the search bar, there's a section for 'Match all of the following criteria' with a '+ Add criteria' button. This section contains three criteria: 'Membership level' (set to 'is'), 'Level last changed' (set to 'on or after 1 April 2019'), and 'Level last changed' (set to 'on or before 30 April 2019'). Each criterion has a 'remove' link next to it. To the right of these criteria are radio button options for 'Admins (formerly Webma...', 'Alumni (formerly Frien...', 'Extended Newcomer', and 'Newcomer Member'. Below this is another set of criteria: 'Member status' (set to 'is'), 'Level last changed' (set to 'on or after 1 April 2019'), and 'Level last changed' (set to 'on or before 30 April 2019'). Each has a 'remove' link. To the right are radio button options for 'Active', 'Lapsed', 'Pending - Renewal', 'Pending - New', and 'Pending - Level change'. At the bottom of the search interface are 'Search', 'Save search as: 3rd year extensions', and 'Save' buttons. A red box highlights the 'Records found: 5' message at the bottom.

## 2nd year members who graduated between (specify past start & end dates)

Since all 2<sup>nd</sup> year members who do *not* extend their membership receive an email announcing their “graduation”, we can quickly determine how many members joined between two dates by using the simple search function contained within the [Email Log search page](#).

Select the date range and search for “graduation member”.

If you want the number who graduated last month, select the first and last days of the month you are interested in. Be aware that running this search in the middle of a month only gives results up to the day this search is run, so to be accurate you must run this search no sooner than the first day of the following month.

The Email Log search for the month of April 2019 yields the results shown below:

The screenshot shows the 'Email' tab selected in the navigation bar. Under the 'Log' tab, the search results for 'graduation member' are displayed. The search parameters are set to '1 April 2019' and '30 April 2019'. The search term 'graduation member' is highlighted. The results table shows 18 records found, with each row detailing an automatic email sent on specific dates to various recipients.

Date	Type	Email details	To	Opens	Clicks	Delivery
April 27, 2019 12:00 AM	Automatic	Graduation Letter from {Organization_Nam Membership renewal day notice Newcomer Member	Schultz, Mike Copied to admin(s)	-	-	Delivered
April 27, 2019 12:00 AM	Automatic	Graduation Letter from {Organization_Nam Membership renewal day notice Newcomer Member	Zachrisson, Deanna Copied to admin(s)	Opened	-	Delivered
April 24, 2019 12:02 AM	Automatic	Graduation Letter from {Organization_Nam Membership renewal day notice Newcomer Member	Gorman, Vicki Copied to admin(s)	-	-	Delivered
April 19, 2019 12:00 AM	Automatic	Graduation Letter from {Organization_Nam Membership renewal day notice Newcomer Member	Barker, Naomi Copied to admin(s)	Opened	-	Delivered
April 16, 2019 12:01 AM	Automatic	Graduation Letter from {Organization_Nam Membership renewal day notice Newcomer Member	Lang, Brenda Copied to admin(s)	Opened	-	Delivered
April 16, 2019 12:01 AM	Automatic	Graduation Letter from {Organization_Nam Membership renewal day notice Newcomer Member	Wall, Bruce	Opened	-	Delivered

The saved search that yields the same results is called [\\* 2nd yr Mbrs who graduated](#). Click on this link to go directly to this search if you are already logged in as an admin.

For this saved search, **3** dates need to be changed before the search is run.

First, to properly qualify the results we need to exclude 3rd year graduates by setting the “member since on or after” date to approximately 2.5 years prior to the month of graduation that you are interested in. For members graduating in April of 2019, I set this date to Jan 1 2017.

You also need to change the “level last changed on or after date” to the beginning of the time period that you are interested in and the “level last changed on or before” date to the end of the time period you are looking for.

Here's what this search looks like for 2<sup>nd</sup> year members who graduated in April of 2019.

The screenshot shows the 'Member list' search interface. At the top, there is a search bar with '2nd year graduates' and dropdown menus for 'Layout: Default layout' and 'Sort by: Last name'. Below this, a section titled 'Match all of the following criteria' contains several search criteria:

- Membership level: 'is' Admins (formerly Webmaster), Alumni (formerly Friend), Extended Newcomer, Newcomer Member. The 'Alumni' option is selected.
- Organization: 'does not contain' graduate, fan.
- Member since: 'on or after' 1 January 2017.
- Level last changed: 'on or after' 1 April 2019.
- Level last changed: 'on or before' 30 April 2019.

At the bottom of the search form, there are 'Search', 'Save search as: 2nd year graduates', and 'Save' buttons. The message 'Records found: 19' is displayed above the results table. The results table has columns: Member, Membership, Member status, Email, and Last login.

Notice that the results of these two searches yield different statistics. The saved search included one member whose email delivery was disabled by WA on December 11, 2018 due to persistent delivery failures. Exploring further, this member's last event was in September 2017 so presumably he is no longer around. However, his renewal due date was April 6, 2019 so he was “graduated” by WA and is now an Alumnus but he was NOT sent a graduation email.

## 3rd year members who graduated between (specify past start & end dates)

Since all 3<sup>rd</sup> year members receive an email announcing their “graduation”, we can quickly determine how many members joined between two dates by using the simple search function contained within the [Email Log search page](#).

Select the date range and search for “graduation extended”.

If you want the number who graduated last month, select the first and last days of the month you are interested in. Be aware that running this search in the middle of a month only gives results up to the day this search is run, so to be accurate you must run this search no sooner than the first day of the following month.

The Email > Log search for the month of April 2019 yields the results shown below:

The screenshot shows the 'Email log' search interface. At the top, there's a navigation bar with tabs for Dashboard, Contacts, Website, Events, Members, Store, Donations, Finances, Email (which is selected), and Settings. Below that is a secondary navigation bar with links for Emails, Templates, Log (selected), and Settings. The main area has a 'Back' link and a title 'Email log - April 01, 2019 – April 30, 2019'. On the right, there's a note about Open/Clicks tracking: ON with a 'Go to settings' link. Below the title are search filters: 'Select range...' dropdown (set to '1 April 2019' to '30 April 2019'), a 'Search' input field containing 'graduation extended', and a 'Records found: 7' label. A 'Filter by' dropdown is set to 'All'. The main table lists seven email logs from April 9 to April 12, 2019, all categorized as 'Automatic' type. Each row includes columns for Date, Type, Email details, To, Opens, Clicks, and Delivery status (all marked as Delivered). The 'Email details' column for each row shows 'Graduation Letter from {Organization\_Nam}' followed by 'Membership renewal day notice' and 'Extended Newcomer'.

Date	Type	Email details	To	Opens	Clicks	Delivery
April 12, 2019 12:00 AM	Automatic	Graduation Letter from {Organization_Nam} Membership renewal day notice Extended Newcomer	Thayer, Maria Copied to admin(s)	Opened	-	Delivered
April 10, 2019 12:02 AM	Automatic	Graduation Letter from {Organization_Nam} Membership renewal day notice Extended Newcomer	Gill, Keith Copied to admin(s)	Opened	-	Delivered
April 09, 2019 12:00 AM	Automatic	Graduation Letter from {Organization_Nam} Membership renewal day notice Extended Newcomer	Williams, Paula Copied to admin(s)	Opened	-	Delivered
April 09, 2019 12:00 AM	Automatic	Graduation Letter from {Organization_Nam} Membership renewal day notice Extended Newcomer	Thayer, Tom Copied to admin(s)	Opened	-	Delivered

The saved search that yields the same results is called [\\* 3rd yr Mbrs who graduated](#). Click on this link to go directly to this search if you are already logged in as an admin.

For this saved search, 3 dates need to be changed before the search is run.

First, to properly qualify the results we need to exclude 2 year graduates by setting the “member since on or before” date to approximately 2.5 years prior to the month of graduation that you are interested in. For members graduating in April of 2019, I set this date to Jan 1 2017.

You also need to change the “level last changed on or after date” to the beginning of the time period that you are interested in and the “level last changed on or before” date to the end of the time period you are looking for.

Here's what this search looks like for 3<sup>rd</sup> year members who graduated in April of 2019.

The screenshot shows a member search interface with the following details:

- Search name:** 3rd year graduates
- Layout:** Default layout
- Sort by:** Last name
- Match criteria:** all of the following criteria
- Membership level:** is Alumni (formerly Friend)
- Organization:** does not contain graduate
- Organization:** does not contain fan
- Member since:** on or before 2017-01-01
- Level last changed:** on or after 2019-04-01
- Level last changed:** on or before 2019-04-30

A red box highlights the search name field, and a red arrow points from the "on or before" date for "Level last changed" to the text "Change ALL these dates!" located above the search criteria section. A red box also highlights the "Records found: 7" message at the bottom left.

## 2nd year members whose membership will expire between (specify future start & end dates)

There is no Email Log search for this because no Emails have been sent yet!

There is a saved search called [\\* 2nd yr Mbrs who will expire](#) that can be used to predict how many Newcomer members will reach the end of their 2 year terms between the specified dates. Click on this link to go directly to this search if you are already logged in as an admin.

This will mostly be used for 1 month in advance but any *future* date range can be specified.

The results for this future search are shown below:

The screenshot shows the 'Member list' search interface. A red box highlights the 'Search name' field containing '2nd year extension eligible'. A red arrow points from the text 'Change these dates' to the 'Renewal due' date range fields, which are also highlighted with a red box. The 'Renewal due' field shows 'on or after 1 May 2019' and 'on or before 31 May 2019'. A red box highlights the 'Records found: 9' message at the bottom left. The interface includes tabs for Dashboard, Contacts, Website, Events, Members (selected), Store, Donations, Finances, Email, and Settings. Sub-tabs under Members include Summary, List, Saved searches, Levels, Groups, Membership fields, Member emails, Card, Polls, and Other settings. Buttons for Add member, Export, and Email members are also visible.

## 3rd year members whose membership will expire between (specify future start & end dates)

There is no Email Log search for this because no Emails have been sent yet!

There is a saved search called [\\* 3rd yr Mbrs who will expire](#) that can be used to predict how many Newcomer members will reach the end of their 3rd year term between the specified dates. Click on this link to go directly to this search if you are already logged in as an admin.

This will mostly be used for 1 month in advance but any *future* dates can be specified.

The results for this future search are shown below:

The screenshot shows the 'Member list' search interface. At the top, there's a search bar with '3rd year future graduates' and dropdown menus for 'Layout: Default layout' and 'Sort by: Last name'. Below this, a section titled 'Match all of the following criteria' includes a '+ Add criteria' button. A red arrow points from the text 'Change these dates!' to the date range fields. The first field is 'Renewal due on or after 2019-05-01' and the second is 'Renewal due on or before 2019-05-31'. Both fields have 'remove' links next to them. At the bottom, there are 'Search', 'Save search as:', and 'Save' buttons. A red box highlights 'Records found: 7'. The table header includes columns for Member, Membership, Member status, Email, and Last login.

Member	Membership	Member status	Email	Last login