

## **Membership Data Integrity and Delegate Allocation – Summary and Clarification**

A recent blog post has raised questions about membership data in our CRM system, specifically regarding duplicate contact records and pledge acknowledgment fields. These topics relate to known legacy data quality issues that have been repeatedly disclosed to affiliates, stakeholders, and the board over the past year. The blog post does not identify any new issues beyond those already known and actively being addressed.

This summary explains the relevant issues and how they affect membership reporting and delegate allocation.

### **Duplicate Contact Records**

Duplicate contact records exist in the CRM, primarily due to legacy system migrations, historical imports, and limitations in earlier matching processes. This has been a known and openly communicated issue.

Stakeholders and affiliates have been repeatedly informed that:

- Duplicate records can occur in legacy-derived systems.
- Affiliates receive regular exports of their membership data and can identify and report duplicates.
- Specific duplicate cases are corrected as they are identified.
- Ongoing efforts are underway to systematically reduce and eliminate duplicate records.

Duplicate contacts can affect “Total Membership” counts in raw data. However, sustaining membership—the category used for delegate allocation—is based on additional criteria and reporting safeguards and so is less susceptible to duplicate issues than Total Membership.

### **Pledge Acknowledgment Field and Legacy System Limitations**

Sustaining membership requires an affirmative pledge acknowledgment recorded in the CRM. The blog post highlights cases where qualifying donors appear to lack a recorded pledge.

This reflects a known limitation of the legacy CRM system, where the pledge checkbox could be unintentionally cleared depending on how donation forms were configured or used. As a result, some individuals who had signed the pledge may have had that record unintentionally removed.

To address this, several corrective steps have been implemented:

- Migration to an improved CRM system with stronger pledge tracking, including signed and revoked dates
- Direct outreach, including emails and calls, to qualifying donors whose pledge acknowledgment may be missing
- Corrective updates to records where pledge affirmation can be reasonably confirmed
- Ongoing efforts to ensure all qualifying sustaining members have properly recorded pledge acknowledgment

These steps ensure that sustaining membership records accurately reflect valid members despite legacy system limitations, while not classifying any contact as a sustaining member without documentation of a signed pledge.

### **Total Membership vs Sustaining Membership**

The blog post conflates Total Membership and Sustaining Membership, which serve different purposes.

- **Total Membership** is based primarily on pledge acknowledgment recorded on contact records and can be affected by legacy duplicates and pledge tracking issues.
- **Sustaining Membership**, which determines delegate allocation, requires both pledge acknowledgment and qualifying contributions and is calculated using defined reporting logic and validation.

Delegate allocation is based exclusively on sustaining membership counts.

### **Accuracy and Mitigation Efforts**

Due to legacy system limitations, it is possible that membership counts may not be perfectly precise in every individual case. However, extensive mitigation steps have been taken to ensure accuracy, including:

- Correcting known duplicate records
- Improving pledge tracking systems
- Conducting outreach to qualifying members to confirm pledge status
- Implemented reporting safeguards to ensure only qualifying sustaining members are counted

Specific known discrepancies that could affect sustaining membership have been addressed as identified, and ongoing remediation efforts continue to improve data accuracy.

Affiliates have also had ongoing visibility into their membership data and opportunities to review and report discrepancies.

### **Conclusion**

The issues discussed in the blog post reflect known legacy data limitations that have already been disclosed and are actively being addressed. These legacy data limitations have been documented in prior membership reports and affiliate data exports, and remediation efforts have been ongoing and transparent.

While historical data imperfections exist, all reasonable mitigation steps have been taken, and sustaining membership counts used for delegate allocation represent the most accurate and reliable determination possible given the legacy system environment.

We remain committed to improving data quality, maintaining transparency, and ensuring the integrity of membership reporting and delegate allocation.