# Association Member Database Module Checklist

For association managers reviewing the core data module inside membership or association management software.

## How to use this checklist

This checklist covers one functional module within a wider membership management or association management system. Mark what your association needs, add your policy decisions, and ask shortlisted vendors to demonstrate the difficult cases using realistic member data.

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|---|---|
| Association | |
| Reviewer and date | |
| Shortlisted system | |

## People, organisations, and memberships

| Check | Requirement or decision | Notes |
|---|---|---|
| [ ] | Store people and organisations as separate records and connect them when required. | |
| [ ] | Keep the member separate from the membership type, status, and validity period they hold. | |
| [ ] | Preserve previous membership terms, upgrades, downgrades, lapses, and reinstatements. | |
| [ ] | Support individual, corporate, free, paid, lifetime, chapter, and other required membership structures. | |

## Corporate relationships

| Check | Requirement or decision | Notes |
|---|---|---|
| [ ] | Store the organisation as the corporate member rather than duplicating it for every employee. | |
| [ ] | Define primary, billing, administrative, voting, and ordinary representative roles. | |
| [ ] | Add start and end dates to roles and access. | |

| Check | Requirement or decision | Notes |
|---|---|---|
| [ ] | Replace a representative without losing the person's activity or the company's membership history. | |

## Connected records

| Check | Requirement or decision | Notes |
|---|---|---|
| [ ] | Connect applications, evidence, decisions, and exceptions to the resulting membership. | |
| [ ] | Connect invoices and payments to the correct member and membership period. | |
| [ ] | Connect event registration, attendance, committees, chapters, documents, and CPD where required. | |
| [ ] | Show the source and current status of each important record. | |

## Data quality and history

| Check | Requirement or decision | Notes |
|---|---|---|
| [ ] | Agree the meaning, owner, visibility, and retention rule for every important field. | |
| [ ] | Use internal identifiers that remain stable when names or email addresses change. | |
| [ ] | Identify possible duplicates without automatically merging uncertain matches. | |
| [ ] | Preserve the actor, date, previous value, new value, and reason for significant changes. | |
| [ ] | Define which old records are retained, archived, anonymised, or deleted. | |

## Access, reporting, and migration

| Check | Requirement or decision | Notes |
|---|---|---|
| [ ] | Define access for membership, finance, events, reviewers, chapter staff, and members. | |
| [ ] | Agree operational definitions for active member, new member, renewal, lapse, and revenue. | |
| [ ] | Confirm that staff can filter, report, and export without vendor assistance. | |
| [ ] | Inventory every spreadsheet, database, document store, and connected system before migration. | |

| Check | Requirement or decision | Notes |
|---|---|---|
| [ ] | Run a trial migration and reconcile counts, balances, relationships, and sample histories. | |
| [ ] | Test one individual member and one complex corporate member from end to end. | |

## Vendor demonstration notes

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**Next step**

Use the completed checklist to write a short brief: must-have rules, acceptable workarounds, data to migrate, integrations to confirm, and three scenarios every vendor must demonstrate.