



# SUSTAINABILITY CHALLENGE

## Submission Form

***NOTE: This form contains abbreviated titles for the Required and Elective Actions. For the full description, please refer to the specific Modules found on Pages 7-15.***

|                                       |                      |                      |                      |
|---------------------------------------|----------------------|----------------------|----------------------|
| <b>Name of Civil War Round Table:</b> | <input type="text"/> |                      |                      |
| <b>Submitted by:</b>                  | <input type="text"/> |                      |                      |
| <b>Title:</b>                         | <input type="text"/> | <b>Phone number:</b> | <input type="text"/> |
| <b>Email address:</b>                 | <input type="text"/> |                      |                      |

# 1. MEMBER – RETENTION / ENGAGEMENT

| REQUIRED ACTIONS             | Required                 |
|------------------------------|--------------------------|
| I. MEMBER RETENTION TEAM     | <input type="checkbox"/> |
| II. MEMBER CONTACTS          | <input type="checkbox"/> |
| III. WEBSITE or SOCIAL MEDIA | <input type="checkbox"/> |

| ELECTIVE ACTIONS             |                          | Which five elective actions were completed? |                          |                            |                          |
|------------------------------|--------------------------|---|--------------------------|----------------------------|--------------------------|
| 1. Regular member contact    | <input type="checkbox"/> | 2. Contact about dues                       | <input type="checkbox"/> | 3. Newsletter policy       | <input type="checkbox"/> |
| 4. Member status checks      | <input type="checkbox"/> | 5. Second dues contact                      | <input type="checkbox"/> | 6. Newsletter distribution | <input type="checkbox"/> |
| 7. Promote activities        | <input type="checkbox"/> | 8. Inform about meetings                    | <input type="checkbox"/> | 9. Celebrate birthdays     | <input type="checkbox"/> |
| 10. Member incentive program | <input type="checkbox"/> | 11. Elicit member support                   | <input type="checkbox"/> | 12. Other (explain below)  | <input type="checkbox"/> |

# 2. EDUCATION – MEMBERS

| REQUIRED ACTIONS                  | Required                 |
|-----------------------------------|--------------------------|
| I. PROGRAMS PRESENTED AT MEETINGS | <input type="checkbox"/> |

| ELECTIVE ACTIONS             |                          | Which four elective actions were completed? |                          |                          |                          |
|------------------------------|--------------------------|---|--------------------------|--------------------------|--------------------------|
| 1. Online enrollment program | <input type="checkbox"/> | 2. Study groups                             | <input type="checkbox"/> | 3. Book/video library    | <input type="checkbox"/> |
| 4. Program Committee         | <input type="checkbox"/> | 5. Maintains library                        | <input type="checkbox"/> | 6. Various forms of edu  | <input type="checkbox"/> |
| 7. Technology guidance       | <input type="checkbox"/> | 8. Distrib Congress emails                  | <input type="checkbox"/> | 9. Other (explain below) | <input type="checkbox"/> |

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### 3. RECRUITMENT – MARKETING

| REQUIRED ACTIONS                                 | Required                 |
|--|--------------------------|
| I. PERSONAL INVITATIONS TO JOIN                  | <input type="checkbox"/> |
| II. STRUCTURED CONTACT AND RE-ENGAGEMENT PROGRAM | <input type="checkbox"/> |

| ELECTIVE ACTIONS            |                          | Which five elective actions were completed? |                          |                           |                          |
|-----------------------------|--------------------------|---|--------------------------|---------------------------|--------------------------|
| 1. Recruitment group        | <input type="checkbox"/> | 2. Mailed invitations                       | <input type="checkbox"/> | 3. “Bring a Friend” night | <input type="checkbox"/> |
| 4. Top recruiter incentives | <input type="checkbox"/> | 5. Assigned mentors                         | <input type="checkbox"/> | 6. Arranged transport     | <input type="checkbox"/> |
| 7. Follow-up letters        | <input type="checkbox"/> | 8. Special event invitations                | <input type="checkbox"/> | 9. 5% ↑ new members       | <input type="checkbox"/> |
| 10. 5% ↑ returning memb     | <input type="checkbox"/> | 11. Formal program packet                   | <input type="checkbox"/> | 12. Member data form      | <input type="checkbox"/> |
| 13. On-boarding program     | <input type="checkbox"/> | 14. Other (explain below)                   | <input type="checkbox"/> |                           |                          |

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### 4. NEW MEMBER – ENGAGEMENT

| REQUIRED ACTIONS                                | Required                 |
|---|--------------------------|
| I. ESTABLISHED POLICY TO MAINTAIN COMMUNICATION | <input type="checkbox"/> |
| II. NEW MEMBERS PROVIDE REQUESTED DATA          | <input type="checkbox"/> |

| ELECTIVE ACTIONS                    |                          | Which four elective actions were completed? |                          |                                |                          |
|-------------------------------------|--------------------------|---|--------------------------|--------------------------------|--------------------------|
| 1. Post-meeting surveys             | <input type="checkbox"/> | 2. Special invitations                      | <input type="checkbox"/> | 3. Joining gifts, photos       | <input type="checkbox"/> |
| 4. Opportunity to interview leaders | <input type="checkbox"/> | 5. Orientation packet                       | <input type="checkbox"/> | 6. Fresh Perspective Committee | <input type="checkbox"/> |
| 7. Plan projects/events             | <input type="checkbox"/> | 8. Post photos/bios                         | <input type="checkbox"/> | 9. Other (explain below)       | <input type="checkbox"/> |

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## 5. MEETING – EXPERIENCE

| REQUIRED ACTIONS                       | Required                 |
|--|--------------------------|
| I. RECOGNITION OR ACHIEVEMENT CEREMONY | <input type="checkbox"/> |
| II. KEY ELEMENTS OF EACH MEETING       | <input type="checkbox"/> |

| ELECTIVE ACTIONS           |                          | Which four elective actions were completed? |                          |                          |                          |
|----------------------------|--------------------------|---|--------------------------|--------------------------|--------------------------|
| 1. Event of 1+ days        | <input type="checkbox"/> | 2. Social period                            | <input type="checkbox"/> | 3. Music                 | <input type="checkbox"/> |
| 4. Promote public history  | <input type="checkbox"/> | 5. Leader review response                   | <input type="checkbox"/> | 6. Register and track    | <input type="checkbox"/> |
| 7. Alternate mtg locations | <input type="checkbox"/> | 8. Membership video                         | <input type="checkbox"/> | 9. Other (explain below) | <input type="checkbox"/> |
|                            |                          |   |                          |                          |                          |

## 6. EDUCATION – NEW MEMBERS

| REQUIRED ACTIONS  | Required                 |
|---|--------------------------|
| I. ORIENTATION SESSIONS                                 | <input type="checkbox"/> |
| II. ROUND TABLE IMPROVEMENT DISCUSSIONS/SOLICITED IDEAS | <input type="checkbox"/> |
| III. INVITATIONS TO BECOME ADVISORS                     | <input type="checkbox"/> |

| ELECTIVE ACTIONS               |                          | Which two elective actions were completed? |                          |                          |                          |
|--------------------------------|--------------------------|--|--------------------------|--------------------------|--------------------------|
| 1. Written history provided    | <input type="checkbox"/> | 2. Intro to CWRT Congress                  | <input type="checkbox"/> | 3. Requested summary     | <input type="checkbox"/> |
| 4. Interest/expectation survey | <input type="checkbox"/> | 5. Distribute CWRT Congress emails         | <input type="checkbox"/> | 6. Other (explain below) |                          |

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## 7. PHILANTHROPY

| REQUIRED ACTION                 | Required                 |
|---------------------------------|--------------------------|
| I. CONDUCT FUNDRAISING PROGRAMS | <input type="checkbox"/> |

| ELECTIVE ACTIONS             |                          | Which three elective actions were completed? |                          |                           |                          |
|------------------------------|--------------------------|--|--------------------------|---------------------------|--------------------------|
| 1. Donor recognition program | <input type="checkbox"/> | 2. Philanthropy report                       | <input type="checkbox"/> | 3. Present to new members | <input type="checkbox"/> |
| 4. Recipient invited         | <input type="checkbox"/> | 5. Corporate donor program                   | <input type="checkbox"/> | 6. Fundraising Committee  | <input type="checkbox"/> |
| 7. Other (explain below)     | <input type="checkbox"/> |  |                          |                           |                          |

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## 8. PUBLIC – IMAGE

| REQUIRED ACTIONS                                      | Required                 |
|---|--------------------------|
| I. SUBMITS 1+ NEWS ITEM FOR CWRT CONGRESS PUBLICATION | <input type="checkbox"/> |
| II. ONE+ PUBLIC SERVICE PROJECT                       | <input type="checkbox"/> |

| ELECTIVE ACTIONS          |                          | Which five elective actions were completed? |                          |                                     |                          |
|---------------------------|--------------------------|---|--------------------------|-------------------------------------|--------------------------|
| 1. Community recognition  | <input type="checkbox"/> | 2. Submits to local news                    | <input type="checkbox"/> | 3. Creates video                    | <input type="checkbox"/> |
| 4. Event for Eagle Scouts | <input type="checkbox"/> | 5. Public Relations Officer role            | <input type="checkbox"/> | 6. Marketing/Social Media Committee | <input type="checkbox"/> |
| 7. Speakers Bureau        | <input type="checkbox"/> | 8. Public events                            | <input type="checkbox"/> | 9. Chamber of Commerce              | <input type="checkbox"/> |

|                           |                          |                           |                          |  |
|---------------------------|--------------------------|---------------------------|--------------------------|--|
| 10. Local community event | <input type="checkbox"/> | 11. Other (explain below) | <input type="checkbox"/> |  |
|                           |                          |                           |                          |  |

## 9. CWRT – LEADERSHIP & MANAGEMENT

| REQUIRED ACTION                                 | Required                 |
|---|--------------------------|
| I. PRESIDING OFFICER OPENS EACH MEETING WITH... | <input type="checkbox"/> |

| ELECTIVE ACTIONS            |                          | Which three elective actions were completed? |                          |                          |                          |
|-----------------------------|--------------------------|--|--------------------------|--------------------------|--------------------------|
| 1. Elected officers' duties | <input type="checkbox"/> | 2. Appointed officers' duty                  | <input type="checkbox"/> | 3. Cmte's duties, jobs   | <input type="checkbox"/> |
| 4. 5-year strategic plan    | <input type="checkbox"/> | 5. Yearly Sustainability Challenge           | <input type="checkbox"/> | 6. Other (explain below) | <input type="checkbox"/> |
|                             |                          |  |                          |                          |                          |

## 10. CWRT – PARTNERSHIPS

| REQUIRED ACTION  | Required                 |
|--|--------------------------|
| I. LIST ALL YOUR POTENTIAL ORGANIZATION PARTNERSHIPS.                            | <input type="checkbox"/> |
| II. DEVELOP PROJECTS LIST THAT YOUR CWRT MIGHT INITIATE WITH COMMUNITY PARTNERS. | <input type="checkbox"/> |

| ELECTIVE ACTIONS  |                          | Which elective actions were completed? |                          |   |                          |
|---|--------------------------|--|--------------------------|---|--------------------------|
| 1. Initiate community organization partnership and describe | <input type="checkbox"/> | 2. List current organization partners  | <input type="checkbox"/> | 3. Describe at least one (1) mutually beneficial project. | <input type="checkbox"/> |
| 4. Plan an America 250 event with a community               | <input type="checkbox"/> | 5. Other (explain below)               | <input type="checkbox"/> |   |                          |

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| partner |  |  |  |  |  |
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I attest that the above statements are true.

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| Name: |  |
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Thank you for completing the Sustainability Challenge.

