

CWRT CONGRESS

THE SUSTAINABILITY CHALLENGE



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CWRT CONGRESS

2502 Caitlin Court SE

Olympia, WA 98501

360-481-3117

www.cwrtcongress.org



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THE SUSTAINABILITY CHALLENGE

PROGRAM DESCRIPTION & PURPOSE

The CWRT Congress' SUSTAINABILITY CHALLENGE is a program designed to provide every local Civil War Round Table (CWRT) and its leaders with useful tools for planning and implementing a well-rounded series of activities to engage every member to improve mission accomplishment. In other words, the SUSTAINABILITY CHALLENGE is designed to help every Round Table provide its members with a superior experience while managing organizational improvement and growth.

It is important to note that the SUSTAINABILITY CHALLENGE is **NOT** a contest or competition. It is also not a "report card." The SUSTAINABILITY CHALLENGE is simply an opportunity for each participating Round Table to challenge itself to be a more vibrant and engaged version of itself through self-guided activities.

Participating in the SUSTAINABILITY CHALLENGE is a local Round Table decision and is strictly voluntary; however, we sincerely hope each Round Table will choose to participate. It is our desire that every Round Table that "embraces" the CHALLENGE will experience a marked increase in member participation and enthusiasm. Moreover, the SUSTAINABILITY CHALLENGE should ultimately improve a Round Table, as well as enrich and enhance the overall experience for every member.

Submission of THE SUSTAINABILITY CHALLENGE is a crucial step in the continued development and success of your Round Table. Lessons learned and best practices on the activities undertaken are extremely valuable pieces of information that will be shared with other Round Tables. By submitting your information, you are helping to improve THE SUSTAINABILITY CHALLENGE for every Round Table member.

To summarize, the SUSTAINABILITY CHALLENGE should make your Round Table stronger, more successful, and provide an enhanced experience and value for your members.



THE SUSTAINABILITY CHALLENGE

RECOGNITION & AWARD

Following the successful completion of all ten (10) modules, the CWRT Congress will present the following:

- SUSTAINABILITY CHALLENGE CERTIFICATE
- Congratulatory Letter from the CWRT Congress President
- THE SUSTAINABILITY CHALLENGE Lapel Pin for each member of the CWRT leadership team
- Recognition at the annual Sustainability Conference
- Recognition on the CWRT Congress social media channels and website
- Recognition in the CWRT Congress' *Light Post*
- A press release to be used by the successful CWRT to their local media



THE SUSTAINABILITY CHALLENGE

MODULE DESCRIPTIONS

Civil War education and member activities represent the heart, soul, and mission of every Civil War Round Table. Every member should expect that these goals and criteria are fully implemented by their leaders, with the expectation of the quality of an enlightened organization.

The intent of the SUSTAINABILITY CHALLENGE is to assist each Round Table to carry out its mission by providing a rewarding experience for its members. The CHALLENGE is broken into 10 Modules which cover the full scope of organizational improvement.

Civil War Round Table leaders are neither expected nor encouraged to complete multiple challenge Modules simultaneously. Rather, it is suggested that a participating Round Table evaluate the status of its organization, determine its strengths and weaknesses, recruit members to form a challenge team, decide which areas are most appropriate for them to address, and to actively pursue completion of the Modules one at a time. It is further recommended that Round Tables evaluate their results to determine if their expectations and goals have been achieved.

Module 1: Membership Retention / Engagement

- Establish a Membership Retention Team (MRT) that is tasked to encourage member renewal.
- Gather and retain member contact information.
- Maintain contact with all members throughout the Round Table season.
- Communicate with members through surveys, telephone calls, emails, texts, and other means.

Module 2: Member Education

- Establish a Program Committee to seek the types of history programs that members desire and provide a program agenda based on member preferences.
- The Round Table should endeavor to provide various programs for members and visitors to engage in the study of the Civil War and 19th Century America.
- The Program Committee should ensure that distant members have access to presentations through various methods including online education.



Module 3: Recruitment Marketing

- The Round Table should develop marketing materials, videos, and presentations that can be displayed in a variety of settings throughout the local community.
- Establish a Membership Recruitment Group (MRG) to schedule a variety of programs to engage members in the recruitment effort.
- The MRG should employ the knowledge of generational interests (Gen X, etc.) to target potential members.

Module 4: New Member Engagement

- The Round Table should adopt an attitude of engagement with new members, seeking their views regarding program choices, and offering them the opportunity to join a Program Advisory Council.
- The Round Table leadership should provide membership gifts to new members and ensure that their biographical information and photographs are displayed through a newsletter and/or social media.
- New members should be encouraged to develop a project or event as a group, when possible.

Module 5: Meeting Experience

- In addition to routine programs, invite living historians, historic musicians and dance groups, poets, and other performers for their entertainment value.
- Members should be continuously surveyed about their meeting experiences and how they may be improved. Utilize the best suggestions for forthcoming program development purposes.

Module 6: New Member Education

- Encourage the provision of gifts for new members that will enhance their education of the Civil War while welcoming them into the membership of the Round Table.
- Introduce new members to the CWRT Congress and the many resources and services provided by the Congress to local Round Tables and their members.

Module 7: Philanthropy

- Enable the Round Table to become known in the local community for involvement in the preservation of historic memories.
- Establish a practice of encouraging Round Table members to join and support preservation organizations.
- Support the good works of community organizations which reflect the mission and values of the local Round Table.

Module 8: Public Image

- Enhance the image of the local Round Table through events, philanthropic activities, and/or other community functions.



- Become the go-to organization about the history of the Civil War and 19th Century America.
- Develop a public persona for your Round Table by recognizing other individuals and organizations that perform public education activities and programs.

Module 9: CWRT Leadership & Management

- Review and update the Round Table constitution and bylaws to include duties, job descriptions and expectations of those who are elected and/or appointed for committee assignments.
- Ask Round Table officials to conduct a self-assessment to ensure they perform their stipulated duties, confront challenges, and support community expansion.
- Provide a level of training and/or mentoring for all Round Table members who assume new duties within the organization.

Module 10: CWRT Partnerships

- Establish real community partnerships that provide interesting activities, enhance member recruitment and retention efforts, and that strengthens all organizational partners and their member experiences.

Round Tables that complete all Required and the requisite number of Elective Initiatives in each numbered Module will earn THE SUSTAINABILITY CHALLENGE ACHIEVEMENT AWARD.



THE SUSTAINABILITY CHALLENGE

COMPLETION INSTRUCTIONS

Each Module has various Initiatives to complete. One or more are Required and several are Elective from which the Round Table may choose. Round Tables may also choose an alternative Elective Initiative that meets the unique needs of that Round Table which is not included in the Elective list.

These Required and Elective Initiatives are designed to challenge the Round Table, its members, and leaders to excel across a broad spectrum of related subjects. They are not to be interpreted literally.

To complete THE SUSTAINABILITY CHALLENGE Submission Form, electronically complete the open Required and Elective spaces provided after every Initiative.

When all 10 Modules are completed, scan and email the completed SUSTAINABILITY CHALLENGE Submission Form to the CWRT Congress at challenge@cwrtcongress.org Only the Submission Form should be returned.

For a detached, fillable PDF form, go to www.cwrtcongress.org/challenge.html



1. MEMBER RETENTION / ENGAGEMENT

REQUIRED INITIATIVES – COMPLETE EACH OF THE FOLLOWING:

- I. Each Round Table has established a Membership Retention Team (MRT) with a list of priority tasks.
- II. The Round Table maintains primary phone numbers and email addresses of all members.
- III. The Round Table maintains an up-to-date website or Facebook page (current with calendar, contact information, etc.), and...

ELECTIVE INITIATIVES – COMPLETE ANY FIVE (5) OF THE FOLLOWING:

1. Contact individual members by letter, social media, email, phone, text, or in person at least every six (6) months (birthday, anniversary, etc.).
2. Contact members who are delinquent in their dues payments within three (3) months of the start of the season. Ascertain if they wish to continue or if they are facing a hardship. Conduct an exit interview if they are leaving the Round Table.
3. Develop and adopt a policy wherein delinquent dues-owing members continue to receive electronic newsletters and other communications from the Round Table.
4. Make personal calls by the MRT to members during the first half of the season. Develop a reporting mechanism to the Round Table that reports the status of members and to outline any issues.
5. The Round Table Secretary or MRT representative should follow up with personal calls to any delinquent members no later than the first half of the season.
6. The Round Table distributes a newsletter at least twice per year to members and partner organizations.
7. The Round Table promotes activities via social media platforms.
8. The Round Table utilizes automated calling systems or email notices to inform members of meetings and other upcoming Round Table events.
9. The Round Table is encouraged to send out a postcard (electronic or paper) during a member's birthday month, inviting him or her to the next meeting/event. Utilize the communication method based upon the member's primary preferred contact.
10. The Round Table establishes a structured member participation incentive program.



11. The Round Table should distribute a list of “lost” members to the Round Table membership for assistance in locating those individuals.

12. Other (*please describe*): _____

2. EDUCATION – MEMBERS

REQUIRED INITIATIVES – COMPLETE EACH OF THE FOLLOWING:

I. Civil War and other appropriate 19th Century history programs are presented at or in conjunction with every stated meeting of the Round Table, and...

ELECTIVE INITIATIVES – COMPLETE ANY FOUR (4) OF THE FOLLOWING:

1. The Round Table members are individually and currently enrolled in an online Civil War education program.
2. The Round Table offers and conducts a Civil War study group program for its members.
3. The Round Table maintains its own functioning Civil War book/video library.
4. The Round Table has established a Program Committee that plans, directs, and carries out educational programs.
5. The Round Table maintains a Library and has a Library Committee that expands its holdings each year.
6. Civil War education is presented via papers, essays, speeches, or guided discussions at the Round Table’s stated meetings and through video communications.
7. The Round Table supports member education to distant members via technology guidance (Skype, Facebook Live, Google Hangouts, YouTube Live, etc.) provided by the Program Committee.
8. The Round Table distributes CWRT Congress emails.
9. Other (*please describe*): _____



3. RECRUITMENT – MARKETING

REQUIRED INITIATIVES – COMPLETE EACH OF THE FOLLOWING:

I. Personal calls or contacts inviting prospects to join are made by the Membership Recruitment Team prior to every stated meeting.

II. The Round Table has a structured contact and re-engagement program for previous members who decide to return to full membership, and...

ELECTIVE INITIATIVES – COMPLETE ANY FIVE (5) OF THE FOLLOWING:

1. The Round Table has developed a Membership Recruitment Group including, at a minimum, a named Chair which meets regularly within the Round Table's geographic area.
2. Invitations to join are mailed to prospects from the Round Table Secretary, or Round Table Membership Recruitment Chair prior to every meeting.
3. At least one "Bring a Friend Night" is conducted by the Round Table each year. The Round Table maintains a stated job description for Top Recruiter.
4. The Round Table offers tangible incentives to Top Recruiters of multiple new members. Please submit a copy of the Round Table's Incentive Project along with this completed submission form.
5. A Mentor is assigned to each new member when membership is completed. The Mentor will maintain contact with the new member prior to, during and after meetings, and will spend personal time with him/her during succeeding meetings.
6. Top Recruiters always offer to personally arrange transportation to and from meetings for new members.
7. The Round Table Secretary mails follow-up letters of regret to prospects who do not accept an invitation to join.
8. The Round Table invites members who are not current in their dues payments to a special event(s) each year.
9. The Round Table experiences a 5% increase in new members from the previous year.
10. The Round Table experiences a 5% increase in returning members from the previous year.



11. The Round Table develops a formal program/packet to be used by Round Table Ambassadors for Membership Recruitment.
12. The Round Table membership data form includes the following fields: primary phone, email address, social media contacts.
13. The Round Table has a defined on-boarding program for new members.
14. Other (please describe): _____

4. NEW MEMBER ENGAGEMENT

REQUIRED INITIATIVES – COMPLETE EACH OF THE FOLLOWING:

I. The Round Table has established a policy to maintain regular, targeted communication with new members (beyond dues notices) for a period of three (3) years.

II. All new members shall provide email addresses, mailing addresses, a primary phone number, and birth month information, and...

ELECTIVE INITIATIVES – COMPLETE ANY FOUR (4) OF THE FOLLOWING:

1. The Round Table conducts post-meeting surveys of new members to be reviewed for substantive improvements.
2. Special invitations are sent to new members informing them of stated meeting dates, notices, upcoming Round Table, and partner events, etc.
3. Distribute joining gift(s) and photographs of new members at stated meetings and ensure that new membership information is publicized via social media.
4. Specifically provide new members an opportunity to interview members of the Round Table leadership team to enable them to learn more about the organization and how they might contribute.
5. The Round Table should create an orientation packet that includes, but is not limited to, a directory of the Round Table officers, a calendar of events, preservation organizations, web/social media information, and a checklist of volunteer opportunities.



6. The Round Table should create a special “Fresh Perspective Committee” made up of new and inactive members with the stated goal of identifying and resolving existing Round Table issues.
7. New Round Table members are encouraged to select, plan, and conduct a project or event as a group, when appropriate.
8. The Round Table should post pictures and short biographical sketches of all new members in the Round Table newsletter.
9. Other (please describe): _____

5. MEETING EXPERIENCE

REQUIRED INITIATIVES – COMPLETE EACH OF THE FOLLOWING:

I. A recognition or achievement ceremony is held honoring Round Table members who have reached a milestone in their affiliation with the organization.

II. Each stated meeting consists of the following key elements: Social Time, Formal Openings/Closings, Officer/Committee Reports, the Education/Entertainment program, and a Question & Answer Period, and...

ELECTIVE INITIATIVES – COMPLETE ANY FOUR (4) OF THE FOLLOWING:

1. At least one Round Table event each year must consist of more than one day.
2. A social period should be provided before or during each meeting to encourage fellowship.
3. Music is an integral part of a good impression and is encouraged for inclusion during stated meetings.
4. Each member should be encouraged to write a personal response to the question of how the Round Table can more effectively promote public history in the local community. The responses should be submitted to the leadership team prior to the close of the first meeting of the season.
5. The leadership team will review each personal response and seriously consider its implementation.
6. The Round Table should officially register ALL meeting attendees and track that data.



7. The Round Table is encouraged to hold meetings at alternate locations from the organization’s primary meeting venue.
8. The Round Table should present a membership video during meetings to depict regularly stated meetings, tours, events, or other activities of the organization.
9. Other (please describe): _____

6. EDUCATION—NEW MEMBERS

REQUIRED INITIATIVES – COMPLETE EACH OF THE FOLLOWING:

I. New members are provided orientation sessions during their initial meetings, in which themes of future programs are discussed, and ideas related to their specific areas of interest are solicited.

II. Continuous Round Table improvement is discussed with new members, and their impressions and ideas are solicited.

III. New members are asked to become *advisors* to the Round Table leadership, and...

ELECTIVE INITIATIVES – COMPLETE ANY TWO (2) OF THE FOLLOWING:

1. All members are presented with a written history of the Round Table.
2. All members are introduced to the CWRT Congress, its mission, and its relationship and benefits to their local Round Table.
3. All members are requested to provide a summary of their education, skills, and abilities upon joining the Round Table.
4. All members are requested to complete an interest and expectations survey.
5. The Round Table will distribute CWRT Congress emails to new members.
6. Other (please describe): _____



7. PHILANTHROPY

REQUIRED INITIATIVES – COMPLETE EACH OF THE FOLLOWING:

I. The Round Table makes a practice to conduct fundraising programs for battlefield preservation and/or for Round Table specific projects that meet the mission of the organization, and...

ELECTIVE INITIATIVES – COMPLETE ANY THREE (3) OF THE FOLLOWING:

1. The Round Table maintains an established donor recognition program.
2. A report on Round Table philanthropies should be presented at a minimum of one (1) stated meeting per year.
3. A presentation on Round Table philanthropies should be provided to new members during their first year.
4. A recipient of the philanthropic contributions of the Round Table should be invited to speak at a stated Round Table meeting or other event of the organization.
5. The Round Table is encouraged to utilize “Amazon Smile” or other similar corporate donor programs to raise funds for affiliated 501(c)(3) charities.
6. The Round Table should appoint a fundraising committee or officer who works with the Round Table leadership to support targeted philanthropies.
7. Other (please describe): _____

8. PUBLIC IMAGE

REQUIRED INITIATIVES – COMPLETE EACH OF THE FOLLOWING:

I. The Round Table annually submits at least one (1) news item for inclusion in a CWRT Congress publication.

II. The Round Table participates in at least one (1) public service project per year, and...

ELECTIVE INITIATIVES – COMPLETE ANY FIVE (5) OF THE FOLLOWING:

1. The Round Table sponsors a community recognition program for teachers, youth organizations, or veterans, etc. (who are not necessarily members).



2. The Round Table submits information on events or philanthropies to local news organizations at least once a year.
3. The Round Table creates a video on history, philanthropies, or other items of interest at least once a year to be utilized for the recruitment of new members, member engagement, or for fundraising purposes.
4. The Round Table promotes a recognition event for new Eagle Scouts.
5. The Round Table has developed a specific role and job description for a Public Relations Officer, who should include managing contacts with local media to promote Round Table activities.
6. The Round Table has a defined and active Marketing & Social Media Committee.
7. The Round Table maintains a “Speakers Bureau” Program that offers educational talks on Civil War and 19th Century American life topics.
8. The Round Table sponsors public events or open houses, tours, etc. to introduce the public to the organization.
9. The Round Table joins, as an organization, the local Chamber of Commerce or other similar associations.
10. The Round Table participates in local community events (county fairs, parades, etc.) as Round Table members.
11. Other (please describe) _____

9. CWRT LEADERSHIP & MANAGEMENT

REQUIRED INITIATIVES – COMPLETE EACH OF THE FOLLOWING:

I. The Presiding Round Table officer officially opens each meeting, and...

ELECTIVE INITIATIVES – COMPLETE ANY THREE (3) OF THE FOLLOWING:

1. The Round Table maintains a list of duties, job descriptions, and expectations for each elected officer.
2. The Round Table maintains a list of duties, job descriptions, and expectations for each appointed officer.



3. The Round Table maintains a list of duties, job descriptions, and expectations for committees.
4. The Round Table develops and maintain a five-year strategic plan (submission of plans with SUSTAINABILITY CHALLENGE submission should be considered).
5. The Round Table conducts a yearly SUSTAINABILITY CHALLENGE review and develops plans for future improvement.
6. Other (please describe): _____

10. CWRT PARTNERSHIPS

REQUIRED INITIATIVES – COMPLETE EACH THE FOLLOWING:

- I. List potential organizational partners in your community and include contact information.
- II. Develop a list of projects your CWRT might initiate with community organizational partners.

ELECTIVE INITIATIVES – COMPLETE ANY OF THE FOLLOWING:

1. Initiate a community organizational partnership. Describe how it is mutually beneficial and attractive to both memberships.
2. List the Round Table's current community organization partners.
3. Describe at least one (1) mutually beneficial project with your community organization partner which the CWRT has been engaged in the last two (2) years.
4. Plan an America 250 event with a community organization partner.
5. Other (please describe): _____



THE SUSTAINABILITY CHALLENGE

SUBMISSION INSTRUCTIONS

When CWRT leadership has completed the Submission Form (Appendix A) for all ten (10) modules, the Submission Form should be emailed to the CWRT Congress for acknowledgement and review. Please use the following email format:

To: challenge@cwrtcongress.org

Subject: **COMPLETED SUSTAINABILITY CHALLENGE**

Having completed all required and elective initiatives of the Sustainability Challenge, the CWRT of _____, in the state of _____, respectfully submits the attached Submission Form and information.

Date

Telephone number

Email address

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Please save your Submission Form with the file name that includes the official name of your Civil War Round Table, the year of submission. Then, email the file to the CWRT Congress at the following address: challenge@cwrtcongress.org

****Do not send the entire Challenge document with the Submission Form. And be sure to maintain a copy for your records. ****

