

CWRT CONGRESS

CWRT SUSTAINABILITY CHALLENGE



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CWRT 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.



CWRT 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 Committees & Groups

- Establish committee(s) that provide improved internal and external communications, additional activities for members, member recruitment projects, liaison with community partners, services to members, and/or improved member experiences.

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



CWRT 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.

The Workbook is for your use only to help facilitate completion of the SUSTAINABILITY CHALLENGE. Electronically complete the Workbook form with the open Required and Elective spaces provided after every Initiative.

When all 10 Modules are completed, complete the Submission Form on Page 16 email it to the CWRT Congress at challenge@cwrtcongress.org. Only the Submission Form should be returned.



WORKBOOK

1. MEMBER – RETENTION / ENGAGEMENT

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

ELECTIVE ACTIONS	Which five elective actions were completed?
1. Contact individual members by letter, social media, email, phone, text, or in person at least every six (6) months (birthday, anniversary, etc.).	<input type="checkbox"/>
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.	<input type="checkbox"/>
3. Develop and adopt a policy wherein delinquent dues-owing members continue to receive electronic newsletters and other communications from the Round Table.	<input type="checkbox"/>
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.	<input type="checkbox"/>
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.	<input type="checkbox"/>
6. The Round Table distributes a newsletter at least twice per year to members and partner organizations.	<input type="checkbox"/>
7. The Round Table promotes activities via social media platforms.	<input type="checkbox"/>
8. The Round Table utilizes automated calling systems or email notices to inform members of meetings and other upcoming Round Table events.	<input type="checkbox"/>
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.	<input type="checkbox"/>



10. The Round Table establishes a structured member participation incentive program.	<input type="checkbox"/>
11. The Round Table should distribute a list of “lost” members to the Round Table membership for assistance in locating those individuals.	<input type="checkbox"/>
12. Other (please describe): _____	<input type="checkbox"/>

2. EDUCATION – MEMBERS

REQUIRED ACTIONS	Required
1. Civil War and other appropriate 19th Century history programs are presented at or in conjunction with every stated meeting of the Round Table, and...	<input type="checkbox"/>

ELECTIVE ACTIONS	Which four elective actions were completed?
1. The Round Table members are individually and currently enrolled in an online Civil War education program.	<input type="checkbox"/>
2. The Round Table offers and conducts a Civil War study group program for its members.	<input type="checkbox"/>
3. The Round Table maintains its own functioning Civil War book/video library.	<input type="checkbox"/>
4. The Round Table has established a Program Committee that plans, directs, and carries out educational programs.	<input type="checkbox"/>
5. The Round Table maintains a Library and has a Library Committee that expands its holdings each year.	<input type="checkbox"/>
6. Civil War education is presented via papers, essays, speeches, or guided discussions at the Round Table’s stated meetings and through video communications.	<input type="checkbox"/>
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.	<input type="checkbox"/>
8. The Round Table distributes CWRT Congress emails.	<input type="checkbox"/>
9. Other (please describe): _____	<input type="checkbox"/>



3. RECRUITMENT – MARKETING

REQUIRED ACTIONS	Required
I. Personal calls or contacts inviting prospects to join are made by the Membership Recruitment Team prior to every stated meeting.	<input type="checkbox"/>
II. The Round Table has a structured contact and re-engagement program for previous members who decide to return to full membership, and...	<input type="checkbox"/>

ELECTIVE ACTIONS	Which five elective actions were completed?
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.	<input type="checkbox"/>
2. Invitations to join are mailed to prospects from the Round Table Secretary, or Round Table Membership Recruitment Chair prior to every meeting.	<input type="checkbox"/>
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.	<input type="checkbox"/>
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.	<input type="checkbox"/>
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.	<input type="checkbox"/>
6. Top Recruiters always offer to personally arrange transportation to and from meetings for new members.	<input type="checkbox"/>
7. The Round Table Secretary mails follow-up letters of regret to prospects who do not accept an invitation to join.	<input type="checkbox"/>
8. The Round Table invites members who are not current in their dues payments to a special event(s) each year.	<input type="checkbox"/>
9. The Round Table experiences a 5% increase in new members from the previous year.	<input type="checkbox"/>
10. The Round Table experiences a 5% increase in returning members from the previous year.	<input type="checkbox"/>



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

4. NEW MEMBER – ENGAGEMENT

REQUIRED ACTIONS	Required
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.	<input type="checkbox"/>
II. All new members shall provide email addresses, mailing addresses, a primary phone number, and birth month information, and...	<input type="checkbox"/>

ELECTIVE ACTIONS	Which four elective actions were completed?
1. The Round Table conducts post-meeting surveys of new members to be reviewed for substantive improvements.	<input type="checkbox"/>
2. Special invitations are sent to new members informing them of stated meeting dates, notices, upcoming Round Table, and partner events, etc.	<input type="checkbox"/>
3. Distribute joining gift(s) and photographs of new members at stated meetings and ensure that new membership information is publicized via social media.	<input type="checkbox"/>
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.	<input type="checkbox"/>
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.	<input type="checkbox"/>
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	<input type="checkbox"/>



issues.	
7. New Round Table members are encouraged to select, plan, and conduct a project or event as a group, when appropriate.	<input type="checkbox"/>
8. The Round Table should post pictures and short biographical sketches of all new members in the Round Table newsletter.	<input type="checkbox"/>
9. Other (please describe): _____	<input type="checkbox"/>

5. MEETING – EXPERIENCE

REQUIRED ACTIONS	Required
I. A recognition or achievement ceremony is held honoring Round Table members who have reached a milestone in their affiliation with the organization.	<input type="checkbox"/>
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...	<input type="checkbox"/>

ELECTIVE ACTIONS	Which four elective actions were completed?
1. At least one Round Table event each year must consist of more than one day.	<input type="checkbox"/>
2. A social period should be provided before or during each meeting to encourage fellowship.	<input type="checkbox"/>
3. Music is an integral part of a good impression and is encouraged for inclusion during stated meetings.	<input type="checkbox"/>
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.	<input type="checkbox"/>
5. The leadership team will review each personal response and seriously consider its implementation.	<input type="checkbox"/>
6. The Round Table should officially register ALL meeting attendees and track that data.	<input type="checkbox"/>
7. The Round Table is encouraged to hold meetings at alternate locations from the organization's primary meeting venue.	<input type="checkbox"/>



8. The Round Table should present a membership video during meetings to depict regularly stated meetings, tours, events, or other activities of the organization.	<input type="checkbox"/>
9. Other (please describe): _____	<input type="checkbox"/>

6. EDUCATION – NEW MEMBERS

REQUIRED ACTIONS	Required
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.	<input type="checkbox"/>
II. Continuous Round Table improvement is discussed with new members, and their impressions and ideas are solicited.	<input type="checkbox"/>
III. New members are asked to become <i>advisors</i> to the Round Table leadership, and...	<input type="checkbox"/>

ELECTIVE ACTIONS	Which two elective actions were completed?
1. All members are presented with a written history of the Round Table.	<input type="checkbox"/>
2. All members are introduced to the CWRT Congress, its mission, and its relationship and benefits to their local Round Table.	<input type="checkbox"/>
3. All members are requested to provide a summary of their education, skills, and abilities upon joining the Round Table.	<input type="checkbox"/>
4. All members are requested to complete an interest and expectations survey.	<input type="checkbox"/>
5. The Round Table will distribute CWRT Congress emails to new members.	<input type="checkbox"/>
6. Other (please describe): _____	<input type="checkbox"/>



7. PHILANTHROPY

REQUIRED ACTION	Required
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...	<input type="checkbox"/>

ELECTIVE ACTIONS	Which three elective actions were completed?
1. The Round Table maintains an established donor recognition program.	<input type="checkbox"/>
2. A report on Round Table philanthropies should be presented at a minimum of one (1) stated meeting per year.	<input type="checkbox"/>
3. A presentation on Round Table philanthropies should be provided to new members during their first year.	<input type="checkbox"/>
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.	<input type="checkbox"/>
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.	<input type="checkbox"/>
6. The Round Table should appoint a fundraising committee or officer who works with the Round Table leadership to support targeted philanthropies.	<input type="checkbox"/>
7. Other (please describe): _____	<input type="checkbox"/>

8. PUBLIC – IMAGE

REQUIRED ACTIONS	Required
I. The Round Table annually submits at least one (1) news item for inclusion in a CWRT Congress publication.	<input type="checkbox"/>
II. The Round Table participates in at least one (1) public service project per year, and...	<input type="checkbox"/>

ELECTIVE ACTIONS	Which five elective actions were completed?
1. The Round Table sponsors a community recognition program for teachers, youth	<input type="checkbox"/>



organizations, or veterans, etc. (who are not necessarily members).	<input type="checkbox"/>
2. The Round Table submits information on events or philanthropies to local news organizations at least once a year.	<input type="checkbox"/>
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.	<input type="checkbox"/>
4. The Round Table promotes a recognition event for new Eagle Scouts.	<input type="checkbox"/>
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.	<input type="checkbox"/>
6. The Round Table has a defined and active Marketing & Social Media Committee.	<input type="checkbox"/>
7. The Round Table maintains a "Speakers Bureau" Program that offers educational talks on Civil War and 19 th Century American life topics.	<input type="checkbox"/>
8. The Round Table sponsors public events or open houses, tours, etc. to introduce the public to the organization.	<input type="checkbox"/>
9. The Round Table joins, as an organization, the local Chamber of Commerce or other similar associations.	<input type="checkbox"/>
10. The Round Table participates in local community events (county fairs, parades, etc.) as Round Table members.	<input type="checkbox"/>
11. Other (please describe) _____	<input type="checkbox"/>

9. CWRT – LEADERSHIP & MANAGEMENT

REQUIRED ACTION	Required
I. The Presiding Round Table officer officially opens each meeting, and...	<input type="checkbox"/>

ELECTIVE ACTIONS	Which three elective actions were completed.
1. The Round Table maintains a list of duties, job descriptions, and expectations for each	<input type="checkbox"/>



elected officer.	
2. The Round Table maintains a list of duties, job descriptions, and expectations for each appointed officer.	<input type="checkbox"/>
3. The Round Table maintains a list of duties, job descriptions, and expectations for committees.	<input type="checkbox"/>
4. The Round Table develops and maintain a five-year strategic plan (submission of plans with SUSTAINABILITY CHALLENGE submission should be considered).	<input type="checkbox"/>
5. The Round Table conducts a yearly SUSTAINABILITY CHALLENGE review and develops plans for future improvement.	<input type="checkbox"/>
6. Other (please describe): _____	<input type="checkbox"/>

10. CWRT – PARTNERSHIPS

REQUIRED ACTION	Required
I. The Round Table partners with community organizations. List your organizational partnerships.	<input type="checkbox"/>
II. Develop a list of projects your CWRT might initiate with community organizational partners.	<input type="checkbox"/>

ELECTIVE ACTIONS	Which elective actions were completed?
1. Initiate a community organizational partnership. Describe how it is mutually beneficial and attractive to both memberships.	<input type="checkbox"/>
2. List the Round Table’s current community organization partners.	<input type="checkbox"/>
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.	<input type="checkbox"/>
4. Plan an America 250 event with a community organization partner.	<input type="checkbox"/>
5. Other (please describe): _____	<input type="checkbox"/>



CWRT SUSTAINABILITY CHALLENGE

SUBMISSION FORM

We certify that all of the required activities and the requisite number of elective activities have been completed for each of the modules.

Please complete the information below and submit this page via email to challenge@cwrtcongress.org.

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

