

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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PROGRAM DESCRIPTION & PURPOSE

The CWRT Congress' SUSTAINABILITY CHALLENGE is an effort to provide every local Civil War CWRT (CWRT) and its leaders with useful tools for planning and implementing a well-rounded series of activities that engage every member to improve the success of their organization. More plainly, SUSTAINABILITY CHALLENGE can help CWRTs to provide its members with a superior experience while supporting 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." It is simply an opportunity for each participating CWRT 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 CWRT option. However, we sincerely hope each CWRT will choose to participate. It is our desire that CWRTs that "embraces" the CHALLENGE will experience a marked increase in member participation and enthusiasm. Moreover, the SUSTAINABILITY CHALLENGE should ultimately improve a CWRT, as well as enrich and enhance the overall member experience.

Additionally, we encourage your CWRT to share your experiences while completing the SUSTAINABILITY CHALLENGE. Lessons learned and best practices on the activities undertaken can become an extremely valuable pieces of information for other CWRTs. By submitting your experiences, you are helping to improve CHALLENGE for every CWRT and member.

In the end, the SUSTAINABILITY CHALLENGE should make your CWRT stronger, more successful, and provide a resource to your community and a value for your members.



MODULE DESCRIPTIONS

Civil War education and member activities represent the heart, soul, and mission of every Civil War CWRT (CWRT). The intent of the SUSTAINABILITY CHALLENGE is to assist each CWRT to carry out its mission by providing a rewarding member experience. The CHALLENGE has 10 Modules which cover the full scope of organizational improvement.

CWRT leaders are neither expected nor encouraged to complete multiple challenge Modules simultaneously. Rather, it is suggested that a participating CWRT evaluate the status of its organization, check off those actions that have been previously completed, recruit members to form a challenge team, prioritize the actions, and actively pursue completion.

Module 1: Membership Retention / Engagement

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

Module 2: Member Education

- Establish a Program Committee to determine the program priorities of members.
- The CWRT should provide a variety of programs based on member preferences.
- The Program Committee should ensure that distant members have access to CWRT programs, presentations, and other materials.

Module 3: Recruitment Marketing

- Develop a CWRT logo or other recognizable representation of CWRT and use it in all aspects of marketing.
- Establish a Membership Recruitment Group (MRG) to develop and schedule activities for the recruitment effort.
- The MRG should develop marketing strategies designed to target potential members.

Module 4: New Member Engagement

- The CWRT 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.
- CWRT leadership should consider providing 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 as a group, when possible.



Module 5: Meeting Experience

- In addition to routine programs, invite living historians, historic musicians, dancers, poets, and other performers for their entertainment value.
- Members should continuously be queried about their meeting experience and how it might be improved. Then, utilize the best suggestions for program development.

Module 6: New Member Education

- Encourage new members to discuss their ideas on how to enhance the delivery of presentations and/or activities to enhance their Civil War education.
- Introduce new members to the CWRT Congress and their resources and services.

Module 7: Philanthropy

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

Module 8: Public Image

- Enhance the image of the local CWRT 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 in your community.
- Develop a public persona for your CWRT by recognizing other individuals and organizations that perform public education activities and programs.

Module 9: CWRT Leadership & Management

- A. Review and update the CWRT constitution and bylaws to include duties and responsibilities of every elected or appointed leader in the CWRT.
- B. Ask CWRT officials to conduct a self-assessment to ensure that they perform expected duties, confront challenges, and support CWRT activities.
- C. Provide a level of training and/or mentoring for all CWRT members who assume new duties within the organization.

Module 10: CWRT Committees & Groups

- Establish leadership group(s) that provide improved communications, relevant activities for members, potential member recruitment projects, liaison with community partners, and/or improved member experiences.



COMPLETION INSTRUCTIONS

Each Module has various Initiatives to complete. One or more of the actions are Required and several are Elective. CWRTs may also choose to implement an alternative Elective Initiative that meets the unique needs of that CWRT despite not being included in the Elective list.

Initiatives are designed to challenge the CWRT, 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 check the module completion boxes, complete the submitter information and email PAGE 15 ONLY to challenge@cwrtcongress.org If you have questions about the challenge, please connect with Dr. John Bamberl at jbamberl@aol.com



1. MEMBER RETENTION / ENGAGEMENT

REQUIRED INITIATIVES – COMPLETE EACH OF THE FOLLOWING:

- A. Established a Membership Retention Team (MRT) with a list of priority tasks.
- B. Maintain primary phone numbers and email addresses of all members.
- C. The CWRT maintains an up-to-date social media presence (with calendar, etc.), and...

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

1. Contact every member at least every six (6) months. Develop a member status report and outline any issues.
2. Contact members whose dues are delinquent within three (3) months of the start of the new season. Conduct an exit interview if they are leaving the CWRT.
3. Develop and adopt a policy wherein delinquent dues-owing members continue to receive electronic newsletters and other communications from the CWRT.
4. Follow up with personal calls to any delinquent members no later than the first half of the season.
5. The CWRT distributes a newsletter at least twice per year to members and partner organizations. A newsletter is a great marketing tool.
6. The CWRT promotes activities via social media.
7. The CWRT utilizes automated calling systems or email notices to inform members of meetings and other upcoming CWRT events.
8. Celebrate members during their birthday month at meetings, activities, the newsletter, email, and/or on social media.
9. The CWRT establishes a structured member participation incentive program.
10. The CWRT distributes a list of “lost” asking for assistance in reconnecting with them.
11. Other (*please describe*): _____



2. EDUCATION – MEMBERS

REQUIRED INITIATIVES – COMPLETE EACH OF THE FOLLOWING:

- A. A Civil War and other appropriate 19th Century history program is presented at or in conjunction with every stated meeting, and...

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

1. Encourage CWRT members to enroll in an online Civil War education program.
2. The CWRT offers and conducts a Civil War study group program for its members.
3. The CWRT maintains a lending library for books and/or videos.
4. Establish a Program Committee that plans, directs, and carries out educational programs.
5. The CWRT supports member education to distant members via technology guidance (Skype, Facebook Live, Google Hangouts, YouTube Live, etc.) provided by the Program Committee.
6. The CWRT promotes CWRT Congress' "Civil War Friday" events.
7. Other *(please describe)*: _____



3. RECRUITMENT – MARKETING

REQUIRED INITIATIVES – COMPLETE EACH OF THE FOLLOWING:

- A. Distribute marketing materials throughout the community prior to every stated meeting.
- B. The CWRT actively seeks out previous members to return to full membership, and...

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

1. Establish a Membership Recruitment Group that meets regularly to develop, report, and evaluates progress.
2. When prospects are identified, the CWRT sends invitations to them.
3. At “Bring a Friend Night” is conducted by the CWRT each year.
4. The CWRT offers tangible incentives to Top Recruiters of multiple new members.
5. Assign a “buddy” to every new member to engage and encourage them.
6. Ask Top Recruiters to personally arrange transportation for recruits.
7. The CWRT connects with those who decline membership and evaluates their reasons.
8. Invite those who are not dues current to a special event(s) each year.
9. The CWRT experiences a 5% increase in new members from the previous year.
10. The CWRT experiences a 5% increase in returning members from the previous year.
11. The CWRT develops a program/packet to be used for Membership Recruitment.
12. The member roster includes address, primary phone number, and email address.
13. The CWRT has an on-boarding program for new members.
14. Other (please describe): _____



4. NEW MEMBER ENGAGEMENT

REQUIRED INITIATIVES – COMPLETE EACH OF THE FOLLOWING:

- A. The CWRT has established a policy to maintain regular, targeted communication with new members (beyond dues notices) for a period of two (2) years.
- B. 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 CWRT 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 CWRT, 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 in the newsletter and/or social media.
4. Specifically provide new members an opportunity to interview the CWRT leadership team to learn more about the organization and how they might contribute.
5. Create an orientation packet that includes, but is not limited to, a directory of the CWRT officers, a calendar of events, preservation organizations, web/social media information, and a checklist of volunteer opportunities.
6. Develop a special “Fresh Perspective Committee” made up of new and inactive members with the stated goal of identifying and proposing issues resolutions.
7. New CWRT members are encouraged to select, plan, and conduct a project or event as a group, when appropriate.
8. Post pictures and short biographical sketches of all new members in the newsletter.
9. Other (please describe): _____



5. MEETING EXPERIENCE

REQUIRED INITIATIVES – COMPLETE EACH OF THE FOLLOWING:

- A. A recognition or achievement ceremony is held honoring CWRT members who have reached a milestone in their affiliation with the organization.
- B. Each stated meeting consists of the following 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 CWRT event each year must consist of more than one day.
- 2. A social period should be provided at each meeting to encourage fellowship.
- 3. A CWRT meeting once per year includes period music and perhaps singing.
- 4. Ask each member to write a personal response to the question: How the CWRT can more effectively promote public history in the local community.
- 5. The leadership team will review each personal response and seriously consider its implementation.
- 6. A roster of all meeting attendees shall be kept and compared with event or program topics.
- 7. CWRT leaders will consider holding meetings at alternate locations.
- 8. Meeting programs include historical topics that are unusual or reflect the interests of members.
- 9. Other (please describe): _____



6. EDUCATION—NEW MEMBERS

REQUIRED INITIATIVES – COMPLETE EACH OF THE FOLLOWING:

- A. New members are provided orientation packets and their questions are answered.
- B. Continuous CWRT improvement is discussed with new members, and their impressions and ideas are solicited.
- C. New members are asked to become *advisors* to the CWRT leadership, and...

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

1. New members are presented with a written history of the CWRT.
2. New members are introduced to the CWRT Congress, its mission, and its relationship and benefits to their local CWRT.
3. New members are requested to provide a summary of their education, skills, and abilities upon joining the CWRT.
4. New members are requested to complete an interest and expectations survey.
5. New members are asked to join the email list of the CWRT Congress.
6. Other (please describe): _____



7. PHILANTHROPY

REQUIRED INITIATIVES – COMPLETE EACH OF THE FOLLOWING:

- A. The CWRT conducts fundraising programs for battlefield preservation and/or for CWRT specific projects that align with the mission of the organization,
- B. CWRT members are encouraged to contribute their time and talents, if not financial support, to historic education purposes, and...

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

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



8. PUBLIC IMAGE

REQUIRED INITIATIVES – COMPLETE EACH OF THE FOLLOWING:

- A. The CWRT annually submits at least one (1) news item for inclusion in a historical publication.
- B. The CWRT participates in at least one (1) public service project every two (2) years, and...

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

1. The CWRT sponsors a community recognition program for teachers, youth organizations, or veterans, etc. (who are not necessarily members).
2. The CWRT submits information on events or philanthropies to local news organizations at least once a year.
3. The CWRT 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 CWRT promotes a recognition event for new Eagle Scouts.
5. Develop a specific role and job description for a Community Outreach Coordinator and supports that as an ongoing effort.
6. The CWRT supports an active Marketing or Social Media Committee.
7. The CWRT maintains a “Speakers Bureau” Program that offers educational talks on Civil War and 19th century American life topics.
8. The CWRT sponsors public events or open houses, tours, etc. to introduce the public to the organization.
9. The CWRT formally joins and maintains its membership in other community groups/organizations.
10. The CWRT participates in local community events (county fairs, parades, etc.).
11. Other (please describe) _____



9. CWRT LEADERSHIP & MANAGEMENT

REQUIRED INITIATIVES – COMPLETE EACH OF THE FOLLOWING:

- A. The Presiding CWRT officer officially opens and closes each meeting.
- B. The leader of the CWRT presides over leadership or board meetings, and...

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

- 1. The CWRT maintains a list of duties, job descriptions, and expectations for each elected officer.
- 2. The CWRT maintains a list of duties, job descriptions, and expectations for each appointed officer.
- 3. The CWRT maintains a list of duties, job descriptions, and expectations for committees.
- 4. Each year, the CWRT develops and reports on an annual set of goals.
- 5. The CWRT conducts a yearly SUSTAINABILITY CHALLENGE review and develops plans for future improvement.
- 6. All leadership or board meetings are open to the general membership, meeting minutes are taken and distributed, and follow-up on assignments is expected.
- 7. Other (please describe): _____



10. CWRT PARTNERSHIPS

REQUIRED INITIATIVES – COMPLETE EACH THE FOLLOWING:

- A. List potential organizational partners in your community including contact information.
- B. Develop a list of projects your CWRT might initiate with community organizational partners.

ELECTIVE INITIATIVES – COMPLETE ANY OF THE FOLLOWING:

1. Initiate a partnership with a community organizational and describe how it is mutually beneficial and attractive.
2. List and publish the CWRT'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): _____



SUBMISSION FORM

CWRT NAME:

CITY/STATE:

I attest that the aforementioned Civil War Round Table has completed all challenge actions, both required and elective.

Submitted by:

Title: Phone:

Email address:

Submit this page only to the CWRT Congress at challenge@cwrtcongress.org

