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| --- | --- |
| **Department:** | Membership |
| **Month/Year:** | March 2025 |
| **Completed By:**  **(name and position)** | Sally Smith, VP of Membership and Nathan Ross, Director of Membership |

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| --- | --- |
| **Task**  SAMPLE | **Completed** |
| Update committee roster (link to live document,   include process to indicate members who should be   considered for succession planning) | X - Nathan |
| Update 18-month calendar, as needed (link to live document) | X - Nathan |
| All department Board members Confirm Board Meeting   attendance to XXX | X – Nathan  X - Sally |
| Confirm next Committee meeting  Date: April 7, 2025  Location: Virtual | X - Nathan |

**High-Level Updates and Highlights Against Business Plan:**

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| --- | --- | --- |
| **Strategic SMART Goal** | **Updates & Highlights** | **Progress** |
| Conduct member survey | Wrote initial list of questions | 20% |
| 3 Star Awards | Recognized 2 people in March and solicited nominations for May | 40% |
| Evening of the Stars | n/a | 5% |
| Welcome new members at each event | Had 2 volunteers at March education event greeting new members | 30% |
| Insider | n/a | 15% |
| Conduct exit survey | Sent surveys to 8 members who canceled in March | 30% |
| New member campaign | Brainstormed possible dates | 5% |

**Requests for Assistance or Collaboration**

* ALL – Submit Award nominations by 4/11

**Volunteer Needs**

* 1 – member recruitment
  + First-time visitor meeting buddy
* 2 – member engagement
  + Door greeter for meetings
  + Writer - anniversary thank you notes

**Agenda Topics w/ Allotted Time or Motions Required for Upcoming Board Meeting**

* Discussion on best time to run new member campaign (15 minutes)

**Additional Comments (if needed)**

* Connected with regional chapters about potentially setting up a joint Affiliate program

SAMPLE

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| --- | --- |
| **Department:** |  |
| **Month/Year:** |  |
| **Completed By:**  **(name and position)** |  |

**Month-End Checklist:**

|  |  |
| --- | --- |
| **Task** | **Completed** |
| Update committee roster (link to live document, include process to indicate members who should be considered for succession planning) |  |
| Update 18-month calendar, as needed (link to live   document) |  |
| All department Board members confirm upcoming Board Meeting attendance to XXX |  |
| Confirm next Committee meeting  Date:  Location: |  |

**High-Level Updates and Highlights Against Business Plan:**

|  |  |  |
| --- | --- | --- |
| **Strategic SMART Goal** | **Updates & Highlights** | **Progress** |
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**Requests for Assistance or Collaboration**

**Volunteer Needs**

**Agenda Topics w/ Allotted Time or Motions Required for Upcoming Board Meeting**

**Additional Comments (if needed)**