



The new, Simplified, Form 27

Instructions and explanations

December 2015

Starting out a new year with the OLD Form 27

FORM 27 - MONTHLY BRANCH MEMBERSHIP REPORT																
				Year: <input type="text"/>	Region: <input type="text"/>				Area: <input type="text"/>				Branch: <input type="text"/>			
MEMBERSHIP																
Line	Description	Prev. Dec.	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	Goal
1	Total No. of active members last month (= Line 15 last month)	----	0	0	0	0	0	0	0	0	0	0	0	0	----	----
2	Total No. on inactive status last month (= Line 6 last month)	----	0	0	0	0	0	0	0	0	0	0	0	0	----	----
3	Members reclassified from active to inactive status this month	----													----	----
4	Inactive members reclassified to active status this month	----													----	----
5	Inactive members Resigned, Deceased, Transferred out or Terminated this month	----													----	----
6	Total number on inactive status this month (Lines 2+3+4+5)		0	0	0	0	0	0	0	0	0	0	0	0	----	----
7	Total No. on list of applicants in process last month (= Line 12 last month)	----	0	0	0	0	0	0	0	0	0	0	0	0	----	----
8	Withdrawals this month from list of applicants in process	----													----	----
9	New applicants this month (including Transfers in and Rejoinders)	----													----	----
10	New applicants accepted this month by the BEC**	----													----	----
11	TOTAL NO. OF NEW ACTIVE MEMBERS IN THIS MONTH (Lines 4-10)	----	0	0	0	0	0	0	0	0	0	0	0	0	0	*
12	Total No. on list of applicants in process this month (Lines 7-8+9-10)		0	0	0	0	0	0	0	0	0	0	0	0	----	----
13	Active members Resigned, Deceased, Transferred out or Terminated this month	----													----	----
14	TOTAL NO. OF ACTIVE MEMBERS OUT THIS MONTH (Lines 3+13)	----	0	0	0	0	0	0	0	0	0	0	0	0	----	----
15	TOTAL NO. OF ACTIVE MEMBERS THIS MONTH (Lines 1+4+10-14)		0	0	0	0	0	0	0	0	0	0	0	0	----	***
* At least 10% of Total Active Members shown in the Prev. Dec. column on Line 15.																
**Branch Executive Committee																
*** At least the number of the Total Active Members shown in the Prev. Dec. column on Line 15.																
LUNCHEON ATTENDANCE																
Line	Description	Prev. Dec.	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	Goal
16	Total No. of active members this month (= Line 15)	----	0	0	0	0	0	0	0	0	0	0	0	0	----	----
17	Number of active branch members in attendance	----													----	----
18	PERCENT OF ACTIVE MEMBERS IN ATTENDANCE (Lines 17/16)	----	####	####	####	####	####	####	####	####	####	####	####	####	----	*
19	GUESTS IN ATTENDANCE (Guests are potential members only)	----													0	**
20	Visitors in attendance (Visitors are all other non members, including speakers)	----													----	----
21	Total attendance (Lines 17+19+20)	----	0	0	0	0	0	0	0	0	0	0	0	0	----	----
*At least 70% of the active members shown on line 15 for each regular monthly luncheon meeting. (There is no goal for Ladies Days Luncheons)																
**At least 10% of Total Active Members shown in the Prev. Dec. column on Line 15 times 2.0.																
NOTES																
1. All of the data in this report are to be determined as of the date of the monthly BEC and luncheon meetings after all inductions and resignations have been reported. New applications and resignations that occur after the monthly BEC meeting shall be reported at the next BEC meeting.																
2. The goals in Lines 11, 15, 18 and 19 are the most important for long term branch health and vitality.																
SUBMITTED BY BIG SIR: <input type="text"/>																
DATE: <input type="text"/>																
Monthly distribution: BEC members, Area Governor, Regional Director, sirstateform27@gmail.com																
Form 27, New 04/30/2010																

Starting out with a New Form 27

FORM 27 - MONTHLY BRANCH MEMBERSHIP REPORT

Blue cells are calculated fields: passworded and locked.

Year Report Month **JAN** Region Area Branch

MEMBERSHIP		Previous Years			Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year Total	Year %	Min Goal	Branch Goal
1	ACTIVE MEMBERS LAST MONTH (= Line 4 last month)				0												----	----	----	----
2	NUMBER OF MEMBERS IN																0		1	
3	NUMBER OF MEMBERS OUT (ATTRITION)																0		----	----
4	NUMBER OF ACTIVE MEMBERS (Lines 1+2-3)				0												----	----	1	
5	TOTAL NUMBER OF ACTIVITIES - including couples				----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----
6	NUMBER OF COUPLES ACTIVITIES																----	----	----	----
7	MEDIAN BRANCH AGE (Active Members)				----	----	----	----	----	----	----	----	----	----	----	----	----	----	----	----

Line 2 Minimum Goal- Process: review Line 3 Attrition for the past 3 years. Estimate attrition by current year-end. Add +1 gain (or other desired gain) to this estimate= Line 2 Goal. THIS IS A KEY GOAL FOR YOUR BRANCH

Membership change this year **0**

Line 4 Goal- Process: Add +1 gain (or other desired gain) to Line 4's prior year-end actual= Line 4 Goal.

LUNCHEON ATTENDANCE

Enter "LDL" above Ladies Day months ==>

Line	Description	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year Total	Year %	Min Goal	Branch Goal
8	ACTIVE BRANCH MEMBERS IN ATTENDANCE													----	----	----	----
9	PERCENT OF ACTIVE MEMBERS IN ATTENDANCE													----	----	70%	
10	GUESTS (Guests are potential members only)													0			

Line 9 Total: To exclude Ladies Days Luncheons from the Year % data enter "LDL" above the appropriate months.

Line 10 Minimum Goal- Process: Divide previous year 'Guests' total by previous year 'Members In' total. Result is No. of Guests needed per New Member (in blue box). Then multiply Line 2 'Min Goal for Members In' by this ratio and this = Min Goal for Guests. It is calculated for you automatically.

Previous Year Guest conversion ratio =

LAST MONTH'S FORM 27 REVIEWED BY BEC? **YES**

NOTE: All of the data in this report are to be determined after the monthly BEC and luncheon meetings. New inductions and resignations that occur after the monthly meetings shall be reported after the next BEC and luncheon meetings.

MONTHLY DISTRIBUTION sirstateform27@gmail.com, BEC, Area Governor, Region Director, Branch RAMP Committee Chairs (Recruitment, Activities, Member Relations, Publicity),
Form 27 for the month should be distributed to the list above by the 10th of the following month (see Rule 167).

SUBMITTED BY:	<input type="text"/>
Title	<input type="text"/>
MEETING DATE:	<input type="text"/>

New Form 27 if used by Branch 8 for 2015

FORM 27 - MONTHLY BRANCH MEMBERSHIP REPORT

Blue cells are calculated fields:
passworded and locked.

Year **2015**

Report Month **NOV**

Region **6**

Area **2**

Branch **8**

MEMBERSHIP		Previous Years			Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year Total	Year %	Min Goal	Branch Goal
Line	Description	2012	2013	2014																
1	ACTIVE MEMBERS LAST MONTH (= Line 4 last month)	307	309	310	313	318	321	321	323	327	326	324	328	328	330					
2	NUMBER OF MEMBERS IN	35	33	34	11	8	4	3	7	0	2	4	3	5	1		48	15.3%	32	40
3	NUMBER OF MEMBERS OUT (ATTRITION)	33	32	31	6	5	4	1	3	1	4	0	3	3	5		35	11.2%		
4	NUMBER OF ACTIVE MEMBERS (Lines 1+2-3)	309	310	313	318	321	321	323	327	326	324	328	328	330	326				314	319
5	TOTAL NUMBER OF ACTIVITIES - Including couples	44	42	47			46			45			46							47
6	NUMBER OF COUPLES ACTIVITIES			28			28			26			25							29
7	MEDIAN BRANCH AGE (Active Members)			76.9			76.8			76.9			76.8							76.8

Line 2 Minimum Goal- Process: review Line 3 Attrition for the past 3 years. Estimate attrition by current year-end. Add +1 gain (or other desired gain) to this estimate= Line 2 Goal. THIS IS A KEY GOAL FOR YOUR BRANCH

Membership change this year **13**

Line 4 Goal- Process: Add +1 gain (or other desired gain) to Line 4's prior year-end actual= Line 4 Goal.

LUNCHEON ATTENDANCE

Enter "LDL" above Ladies Day months ==>

					Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year Total	Year %	Min Goal	Branch Goal
Line	Description	2012	2013	2014																
8	ACTIVE BRANCH MEMBERS IN ATTENDANCE				257	253	275	255	244	114	248	251	229	240	257					
9	PERCENT OF ACTIVE MEMBERS IN ATTENDANCE	77%	77%	76%	81%	79%	86%	79%	75%	35%	77%	77%	70%	73%	79%			77%	70%	77%
10	GUESTS (Guests are potential members only)	60	53	71	11	9	10	6	9		7	7	4	4	8		75	24%	67	84

Line 9 Total: To exclude Ladies Days Luncheons from the 'Year %' data enter "LDL" above the appropriate months.

Line 10 Minimum Goal- Process: Divide previous year 'Guests' total by previous year 'Members In' total. Result is No. of Guests needed per New Member (in blue box). Then multiply Line 2 'Min Goal for Members In' by this ratio and this = Min Goal for Guests. It is calculated for you automatically.

Previous Year Guest conversion ratio = **2.1 guests to add 1 new member**

LAST MONTH'S FORM 27 REVIEWED BY BEC? **YES**

NOTE: All of the data in this report are to be determined after the monthly BEC and luncheon meetings. New inductions and resignations that occur after the monthly meetings shall be reported after the next BEC and luncheon meetings.

MONTHLY DISTRIBUTION sirstateform27@gmail.com, BEC, Area Governor, Region Director, Branch RAMP Committee Chairs (Recruitment, Activities, Member Relations, Publicity).
Form 27 for the month should be distributed to the list above by the 10th of the following month (see Rule 167).

SUBMITTED BY:	Bill Peterson	
Title	Attendance Chairman	Phone #
MEETING DATE:	11/16/2015	***_**_****

The remaining 3 slides are useful when watching the 2 videos about the Form.

What to look out for on the New Form 27

FORM 27 - MONTHLY BRANCH MEMBERSHIP REPORT

Blue cells are calculated fields: passworded and locked.

Year **1** Report Month **JAN 3** Region Area Branch

MEMBERSHIP

Line	Description	Previous Years			Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year Total	Year %	Min Goal	Branch Goal
1	ACTIVE MEMBERS LAST MONTH (= Line 4 last month)				0												----	----	----	----
2	NUMBER OF MEMBERS IN																0		1	
3	NUMBER OF MEMBERS OUT (ATTRITION)																0		----	----
4	NUMBER OF ACTIVE MEMBERS (Lines 1+2-3)				0												----	----	1	
5	TOTAL NUMBER OF ACTIVITIES - including couples																----	----		
6	NUMBER OF COUPLES ACTIVITIES																----	----	5	6
7	MEDIAN BRANCH AGE (Active Members)																----	----		

Line 2 Minimum Goal- Process: review Line 3 Attrition for the past 3 years. Estimate attrition by current year-end. Add +1 gain (or other desired gain) to this estimate= Line 2 Goal. THIS IS A KEY GOAL FOR YOUR BRANCH

Membership change this year **0 9**

Line 4 Goal- Process: Add +1 gain (or other desired gain) to Line 4's prior year-end actual= Line 4 Goal.

LUNCHEON ATTENDANCE

Enter "LDL" above Ladies Day months ==>

Line	Description	Previous Years			Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year Total	Year %	Min Goal	Branch Goal
8	ACTIVE BRANCH MEMBERS IN ATTENDANCE																----	----	----	----
9	PERCENT OF ACTIVE MEMBERS IN ATTENDANCE																----	----	70%	
10	GUESTS (Guests are potential members only)																0			

Line 9 Total: To exclude Ladies Days Luncheons from the 'Year %' data enter "LDL" above the appropriate months.

Line 10 Minimum Goal- Process: Divide previous year 'Guests' total by previous year 'Members In' total. Result is No. of Guests needed per New Member (in blue box). Then multiply Line 2 'Min Goal for Members In' by this ratio and this = Min Goal for Guests. It is calculated for you automatically.

Previous Year Guest conversion ratio = **12**

LAST MONTH'S FORM 27 REVIEWED BY BEC? **YES 13**

NOTE: All of the data in this report are to be determined after the monthly BEC and luncheon meetings. New inductions and resignations that occur after the monthly meetings shall be reported after the next BEC and luncheon meetings.

14 MONTHLY DISTRIBUTION **sirstateform27@gmail.com**, BEC, Area Governor, Region Director, Branch RAMP Committee Chairs (Recruitment, Activities, Member Relations, Publicity).

15 Form 27 for the month should be distributed to the list above by the 10th of the following month (see Rule 167).

Revised 12/01/2015 by D Dill, J Strain, D DeVoe, D Southern, W Peterson

SUBMITTED BY:	16	
Title	17	Phone #
MEETING DATE:	18	19

To Start a New Form 27

Watch Introductory movie, parts 1 & 2

Available on YouTube

#1: <https://youtu.be/NWiCl1RjxnE>

#2: <https://youtu.be/AN7U8VSyTpQ>

Adding Data to a blank Form 27

Get the necessary historical (previous 3 years) data ready. You will need:

- Form 27 from 3 previous years
 - Add Year, Month, Region. Area, Branch in top row boxes
 - The number of Active Members at the end of each year
Enter into Line 1 for each year (yellow boxes)
 - The number of New Members IN (inducted) each year
 - The number of Active members leaving (ATTRITION) each year
 - The Total number of activities at the end of each year (if known)
 - The number of Activities which include couples (but exclude Ladies Day Luncheons and the like) at the end of each year
 - The average percentage of Active Members attending lunch meetings each year
 - The number of guests attending a lunch each year (exclude speakers and other visitors eg Area Governors, Regional Directors)