INSTRUCTIONS for Form 27
MONTHLY BRANCH MEMBERSHIP REPORT

General
Form 27 may be used by the branch's BEC to facilitate review of membership and luncheon attendance statistics. The information may be obtained from the Branch Membership and Attendance Chairmen.

Two short videos introduce Form 27 on YouTube. Copy these into your browser window:

> **Part 1 explains the structure and rationale behind the form (6 minutes)**
> **Available from** https://www.youtube.com/watch?v=NWiCl1RjxnE
>
> **Part 2 demonstrates how to add data to the form (9.5 minutes)**
> **Available from** https://www.youtube.com/watch?v=AN7U8VSyTpQ

These videos are best viewed at 720p, full screen; click on the gear wheel icon (bottom right) to select this setting.

The statistics from Form 27 are used to provide a branch with data to help the BEC manage the branch membership.

How to Download Form 27 from the sirinc.org Website
Navigate to the Forms section of the sirinc.org website and select Form 27, download and save it. Save a working copy with a different name so you have a good version to refer to if things go wrong!

Open Excel (or equivalent program)
Navigate to open your working copy of the Form 27 file and double click it. This   will open Form 27 in Excel. The Form 27 spreadsheet will appear as a fillable, preprogrammed   Excel file.

If you save the file with the SIR standard naming convention, the file would be named like **"form27brnnn_yyyymm.xls"**, where "nnn" is your Branch Number (e.g. 999), "yyyy" is for year (e.g. 2016) and "mm" is month (e.g. 01 for January), resulting in a filename like **"form27br999_202401.xls"** save this to a folder such as "2024sirform27".

There are several free Office suites which offer the same capabilities as MS Office. The one which seems most compatible with Excel is WPS Office from Kingsoft, two others are Libre Office and Apache Open Office. There is also a free Online Excel from Microsoft which only requires a Microsoft account (free) which works with OneDrive, their cloud account and is a little more complicated to work with. The free products can each Save files As Excel format, and the .XLSX is the best choice for compatibility.

.Form 27A, 02/19/2024

An annotated copy of Form 27 is added as page 4 of this message, the annotations refer to the steps in the following instructions.

NOTE: You will need copy of last three year's Form 27 to fully complete Step 2. Step 1.

Input Year, Area and Branch information. (See annotated form, #1)

Step 2. By filling in the Year box at the top, the 3 Previous Years titles will be entered automatically for you. Unfortunately the data below each year is not automatically filled in. It must be done manually.

For each '**Previous Years**' column:

Line 1: Under each "Previous Year" column, you would enter the membership as of December of the year before the year indicated at the top of this column. (When doing the 3rd column: If you have the December Form 27 from the year before the "Input Year", the Line 1 value is in line 4, in the December column, on December Report Form 27).

Line 2: Enter the total number of members IN for year at the top of this column (When doing the 3rd column: If you have the December Form 27 from the year before the "Input Year", it is the "Year Total" column, line 2, "Year Total" on the December Form 27) and the "Number of Members In".

Line 3: Enter the number of members OUT for year at the top of this column (When doing the 3rd column: If you have the December Form 27 from the year before the "Input Year", it is the "Year Total" column, line 3, "Year Total" on the December Form 27) and the "Number of members Out".

Line 4: Enter the "Number of Members" at the end of the year at the top of this column The value entered should equal value in Line 1 plus value in Line 2 minus the value in Line 3 of this column. Line 1 + Line 2 – Line 3.   Note: The Line 4 for the "Previous Year" has a different background color. This is a reminder that this cell must have an entry so that the January "Line 4" has a Starting value. If this is a brand new branch, all the current members are "Line 2"., "Members In", although this could happen in whatever month the Branch began.

Line 5: Enter the number of Activities at the end of the year for the year at the top of this column (When doing the 3rd column: If you have the December Form 27 from the year before the "Input Year", it is the December column, line 5 on the December Form 27). A single activity can be held as few times as once a year or as many times as several times a week. In each case it is a single activity in the count. We have a couples dine out once a month and a ROMEO dine out once a month. We count this as a total of 2 activities.

Line 6: Number of Activities from line 5 that include couples.

Line 7: "Median Branch Age" is the "mathematical Median Value" of the age of our members at the end of December of each "Column Year". Median is defined as the following process. Write the ages for each member down on a separate piece of paper; lay out the papers in increasing number order in a line; find the piece of paper that is in the middle of this line. That paper's value is the "Median" value. This works for an Odd number of members. If you have an even number of members, you will find two ages at the middle. Sum those two numbers and divide the total by 2. This is the "Median".

Line 8: Previous Year average attendance with consideration for PDL or CV tags.
Form 27A, 02/11/2024

Line 9: The value entered is the "Line 9" and "Year %" column value for the end of the Column Year.

Line 10: The value entered is the "Line 10" and "Year Total" column value for the end of the Column Year".

Save the file regularly to prevent data loss if your computer develops a problem!

Note: As of 2019, "Inactive" is no longer recognized as a status in SIR.

Step 3. In the "Branch Goal" column input your Branch objectives. There is a suggested minimum goal default values (in the "Min Goal" column) calculated from your "Previous Years" data. These goals a guide to bring in the necessary number of new members to meet the "PLUS 1" goal and to keep the branch healthy.

The goals can be changed as the year progresses. Our branch makes a goal of +1 on the Line 5 and Line 6 for activities. As we meet the activity goal, we change the branch goal to one more.

Monthly Data Input
The monthly input data for Form 27 are to be determined as of the date of the monthly Branch Executive Committee and Luncheon meetings after all inductions and resignations have been reported. New applications and resignations that occur after the monthly Branch Executive Committee meeting should be reported on Form 27 for the next month.

Step 4. To add data for the current month open the most recent file "form27" from the folder on the hard drive. If you are following the recommended file naming conventions, the file would be named like **"BM132_2024.xls"**

Step 5. To select the month, click on the Month box, then click on the small arrow that appears on the right side. A drop-down menu allows you to choose the month to input data.

For the month of January, input data in the January Column unshaded boxes for lines 2. 3, 8, and 10. Save as **"BN132_2024.xls"** Save this file in the "sirform27" folder

Step 6. Prepare an e-mail distribution list for your BEC.

Step 7. Prepare an e-mail addressed to the "group", attach this month's file eg "BM132_2024.xls" and send.

Step 8. In successive months repeat Steps 4, 5 and 7, changing the saved file name appropriately.

Definitions:

Membership Data
Members: Those on the current Member Roster, including HLM members. As of 2019 there is no status called "inactive" in SIR.

Luncheon Attendance Data:
Members: The number of members in attendance.

Guests: The number of those introduced as potential members (i.e. speakers and other visitors are not included).

Who completes Form 27?
The Membership Chairman arranges for the production and distribution of the Form 27. The Big and Little Sirs are therefore asked to ensure that the Form 27 report is created and sent to the distribution list.

FORM 27 - MONTHLY BRANCH MEMBERSHIP REPORT

Blue & Orange cells are passworded and locked.		Year	2024	Report Month	JAN			Branch	200

MEMBERSHIP

Line	Description	2021	2022	2023	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year Total	Year %	Min Goal	Branc h
1	NUMBER OF MEMBERS LAST MONTH (= last mon	0	0	0	0												-----	-----	-----	-----
2	NUMBER OF MEMBERS IN	0	0	0													0		1	
3	NUMBER OF MEMBERS OUT (ATTRITION)	0	0	0													0		-----	-----
4	NUMBER OF MEMBERS (Lines 1+2-3)	0	0	0	0												-----	-----	1	
5	TOTAL NUMBER OF All ACTIVITIES - including Part	0	0	0	----	----		----	----		----	----		----	----		-----	-----	-----	
6	NUMBER OF PARTNER ACTIVITIES	0	0	0	----	----		----	----		----	----		----	----		-----	-----	-----	
7	MEDIAN BRANCH AGE	0.0	0.0	0.0	-----	-----		-----	-----		-----	-----		-----	-----		-----	-----	-----	

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.	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 Goa

LUNCHEON ATTENDANCE

Enter "PDL" here for Partner Day months ==>

Line	Description	2021	2022	2023	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year Total	Year %	Min Goal	Branc h Goal
8	NUMBER OF MEMBERS IN ATTENDANCE	0	0	0													-----	-----	-----	-----
9	PERCENT OF MEMBERS IN ATTENDANCE	0%	0%	0%													-----	70%		
10	GUESTS (Guests are potential members only)	0	0	0													0		0	

Line 9 Total: To exclude Partner Day Luncheons from the Year % data enter "PDL" 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 =	0.0 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	Send to: BEC members - The State Level reporting is now done with an On-line, Membership Reporting AP	SUBMITTED BY	*Mrs Chair*
		Title	Membership Chairman	Phone #
Form 27 Revised 2023_0825		MEETING DATE		000-000-0000

☐ Prepare Next Year

==**[] prepare next year**==

==**New Feature**==
With this version of Form 27 there is a "Check Box" at the bottom that will cause a display of the table that can be used to populate next year's Form 27. To use, this just left click on the "Check Box" Then, use Copy and Paste to move the data to the "Previous Years" Form to the new Form 27

Form 27A, 02/19/2024