

FORM 27A

INSTRUCTIONS - MONTHLY BRANCH MEMBERSHIP REPORT

General

Form 27 is designed to provide a standard form that facilitates review of membership and luncheon attendance statistics. The information to be entered monthly is obtained from the Branch Membership and Attendance Chairmen.

How to Download Form 27 from the sirinc.org Website

**Navigate to the Forms section of the sirinc.org website and select Form 27.
Follow the directions on the Form 27 Download Instructions webpage.**

Open the Form 27 Excel program

Option 1. Launch MS Excel program, navigate to the folder and Form27 Excel program.
Open it by using the Excel FILE, OPEN and then selecting the folder and file

OR -

Option 2. Navigate to the folder containing the Form 27 Excel program and double click on the Form27 Excel program file. This will open Excel and the program.

The Form 27 spreadsheet will appear as a fillable, preprogrammed Excel file.

Input Initial Data

Step 1. Input Year, Region, Area and Branch information.

Step 2. In the Prev. Dec. column input data for lines 6, 12 and 15.

Step 3. In the Goal column input data as instructed by the asterisk references for lines 11, 15 and 19.

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 shall be reported on Form 27 for the next month.

Step 1. 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 "form27brnnnmmmyyyy" where "nnn" is Branch Number (e.g. 146), "mmm" is month (e.g. apr) and "yyyy" is for year (e.g. 2010) and resulting in a filename like "form27br146apr2010"

Step 2. For the month of January input data in the January Column unshaded boxes for lines 3, 4, 5, 8, 9, 10, 13, 17, 19 and 20.

a) Save as "form27brnnnmmmyyyy", for example, "form27br156jan2010".
Save this file in the "sirform27" folder.

Step 3. Prepare an e-mail distribution list. In the Address book input e-mail addresses for each BEC member, Area Governor, Regional Director and sirstateform27@gmail.com. Form a new "group" that includes these e-mail addresses.

- Step 4. Prepare an e-mail addressed to the “group”, attach this month’s file “form27brnnnmmmyyyy”, and send.
- Step 5. Form 27 data will be summarized monthly and published quarterly in the “Membership Statistics” section of the sirinc.org web site for all SIR branches.
- Step 6. For the month of February open file “form27brnnnjanyyyy”.
Input data in the February column unshaded boxes for lines 3, 4, 5, 8, 9, 10, 13, 17, 19 and 20.
a) Save as “form27brnnnmmmyyyy”, for example, “form27br156feb2010”.
This file will be saved in the folder on the hard drive.
- Step 7. Repeat Steps 6 and 4 for each month of the year.

Membership Data

- Active Members: Those on the current Active Member Roster, including HLMs.
Inactive Members: Those on the current Inactive Roster.
Applicants in Process: Those who have submitted applications for membership but not yet accepted by the Branch Executive Committee.

Luncheon Attendance Data

- Active Members: The number of active members, including HLMs, in attendance.
Guests: The number of those introduced as potential members.
Visitors: The number of non-members in attendance, including visitors from other branches, speakers and any other non-members.

Questions Contact

If you have questions regarding the use of this form contact Jim Stedman at e-mail address:
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