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**Membership Activity Plan  
(January - December)  
2005**

Target Date	Status	Task	Responsibility
12/20/04	Done	Update website to include pro-rated membership application	Jessica
1/7/05	1/5/2005	Pro-rated membership promotion to new bar admittees (included notary information as well as a special directory promotion).	Emily/Becky
1/7/05	1/7/05	Membership report	Emily
1/7/05	1/10/2005	Process Membership cards and stickers	Emily
1/14/05	Done	Publish new members in DR.	Jessica/ Becky
1/21/05	Done	Pro-rated membership application to former members with less than five years of practice and not members within the past year.	Emily/Becky
1/21/05	Done	Develop John Mercer Langston Application	Emily/Jessica
2/3/05	Done	Membership Report	Emily
2/4/05	Done	John Mercer Langston Membership Promotion Begins	Emily
2/4/05	Done	Publish new members in DR.	Jessica/ Becky
2/4/05	Done	Process Membership cards and stickers	Emily
2/4/05	Done	Send letters to all new members.	Emily
2/4/05	Done	Send notes to all sustaining members.	Becky
2/4/05	Done	Produce PACO Membership list	Becky
3/3/05	Done	Membership Report	Emily
3/4/05	Done	Publish new members in DR.	Jessica/ Becky
3/4/05	Done	Process Membership cards and stickers	Emily
3/4/05	Done	Send letters to all new members.	Emily
3/4/05	Done	Send notes to all sustaining members.	Becky
3/4/05	Done	Produce PACO Membership list	Becky
3/18/05	Done	Develop three for free application	Emily/Jessica
3/18/05	Done	Draft letter for three for free promotion.	Emily
4/1/05	Done	Publish new members in DR.	Jessica/ Becky
4/1/05	Done	Process Membership cards and stickers	Emily
4/1/05	Done	Send letters to all new members.	Emily
4/1/05	Done	Send notes to all sustaining members.	Becky

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4/1/05	Done	Produce PACO Membership list	Becky
4/4/05	Done	Kick-off three for free. Announce in DR.	Jessica/Emily
4/4/05	Done	Work with OSU and Capital on stuffing a letter and app. In the mailboxes of their law students regarding membership in the Columbus Bar and the three-for-free promotion as well as a directory special offer.	Emily/Lara
4/4/05	Done	Promote three for free to non-member (in practice less than 10 yrs.) former members (last 10 years) – with directory special offer.	Emily/Becky
4/4/05	Done	Membership Report	Emily
4/15/05	Done	Send e-mails to individuals celebrating their 1, 5, 10, 15, 20, 25, 30, etc. years in practice. For those in practice 15+ years – encourage them to upgrade their membership to the sustainer level.	Emily/Becky
4/22/05	Done	Send a personal letter to potential new sustainers	Alex/Emily/Becky
4/27/05	Done	Order two-part invoice forms, two-part letterhead forms (sustainer and paralegal dues), CBF brochures, pink office notice cards (with Firecracker sale info from Donna on the back), return envelopes, “dues notice” window envelopes.	Becky
4/27/05	Done	Notify accounting of estimated postage expense.	Becky
5/1/05	Done	Sustaining member dues flyer to be completed	Emily
5/1/05	Done	Foundation brochure completed for dues mailing	Marion
5/1/05	Done	Committee list completed for dues mailing (send out to copy – 5,500 on blue paper)	Emily
5/3/05	Done	Membership Report	Emily
5/6/05	Done	Publish new members in DR.	Jessica/Becky
5/6/05	Done	Process Membership cards and stickers	Emily
5/6/05	Done	Send letters to all new members.	Emily
5/6/05	Done	Send notes to all sustaining members.	Becky
5/6/05	Done	Produce PACO Membership list	Becky
	Done	Bar Admissions result due	Becky
5/13/05	Done	Send packets to all new admittees	Becky/Jessica
5/13/05	Done	Verify with accounting that all dues prepayments have been posted.	Becky

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5/13/05	Done	Run membership dues billing rollover	Becky
5/13/05	Done	Edit dues message text in membership module, table code processing.	Becky
5/16/05	Done	Print dues invoices (see detail) and committee sign-up labels.	Becky
5/16/05 – 5/18/05	Done	Pull Direct Delivery invoices for delivery to DDI firms (Direct Dues Invoicing), along with corresponding labels, sign-up sheets, etc. Applications will also be included for non-members currently in the firm as well.	Becky/Jessica
5/17/05	Done	Deliver non-DDI invoices, committee sign-ups, labels etc. to fulfillment house.	
6/3/05	Done	Membership Report.	Becky
6/3/05	Done	Publish new members in DR.	Jessica/ Becky
6/3/05	Done	Process Membership cards and stickers	Becky
6/3/05	Done	Send letters to all new members.	Becky
6/3/05	Done	Send notes to all sustaining members.	Becky
5/6/05	Done	Produce PACO Membership list	Becky
6/15/05	Done	Mail out membership cards/stickers	Becky
6/15/05	Done	Send email thank you notes to all renewers	Becky
6/24/05	Done	Send email thank you notes to all renewers	Becky
7/1/05	Done	Order more committee sign-up sheets for 2 <sup>nd</sup> dues mailing (based on current # of unpaid members).	Jessica/ Becky
7/1/05	Done	Publish new members in DR.	Jessica/ Becky
7/1/05	Done	Process Membership cards and stickers	Becky
7/1/05	Done	Send letters to all new members.	Becky
7/5/05	Done	Membership Report.	Becky
7/7/05	Done	Run Selective Dues Processing (see detail, print notice #2, print committee sign-up, labels in same order, affix to sign-ups, stuff invoices, sign-ups, return envelopes and pink official notice slips into “Dues Notice” envelopes.	Becky
7/7/05	Done	Send an e-mail to those individuals who will be receiving their second invoice notice – giving them a heads-up and encouraging them to join.	Becky
7/11/05 –	Done	Send a thank you note to all 2005-	Becky/Emily

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7/22/05		2006 sustaining members. (Alex to sign)	
7/15/05	Done	2 <sup>nd</sup> member invoice sent	Team
7/15/05	Done	Send sustainers personalized 2 <sup>nd</sup> member invoice.	Emily/Becky
7/15/05	Done	Send letters to 02-03 non-renewers and 2004 new bar admittees.	Emily/Becky
8/3/05	Done	Membership Report.	Emily
8/5/05	Done	Publish new members in DR.	Jessica/Becky
8/5/05	Done	Process Membership cards and stickers	Becky
8/5/05	Done	Send letters to all new members.	Becky
8/5/05	Done	Process PACO membership list	Becky
8/5/05	Done	Secretary/Treasurer to review letter to be sent with final dues notice. Obtain Secretary/Treasurer signature too.	Emily
8/12/05	Done	Send a thank you note to sustaining members that have paid since the last round of thank you notes	Emily/Alex
8/12/05	Done	Order (or copy here) more committee sign-up sheets for final dues mailing.	Emily
8/26/05	Done	Send an e-mail to those individuals who will be receiving a third invoice notice – giving them a heads-up and encouraging them to join.	Emily/Becky
8/26/05	Done	Process Notice #4 (Termination Notices) invoices.	Becky
9/2/05	Done	Publish new members in DR.	Jessica/Becky
9/2/05	Done	Process Membership cards and stickers	Emily
9/2/05	Done	Send letters to all new members.	Emily
9/2/05	Done	Send notes to all sustaining members.	Becky
9/2/05	Done	Produce PACO Membership list	Becky
9/2/05	Done	Membership Report.	Emily
9/15/05	Done	Drop those individuals who did not renew their membership.	Becky
9/19/05	Done	Send Broadcast fax for directory verification.	Becky
9/19/05	Done	Send drop data to providers (i.e. Daily Reporter, BOA, etc)	Becky
10/3/05		Membership Report.	Emily
10/7/05		Publish new members in DR.	Jessica/Becky
10/7/05		Process Membership cards and stickers	Emily
10/7/05		Send letters to all new members.	Emily
10/7/05		Send notes to all sustaining	Becky

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		members.	
10/7/05		Produce PACO Membership list	Becky
10/3/05		Call sustaining members who did not renew their membership at the sustainer level.	Emily/Alex
10/3 – 10/14		Make calls to those who did not renew their membership	Emily
10/7/05		Finalize New Bar Admittee kits	Emily
10/7/05		Check Law firm listings for non-members	Emily
10/7/05		Provide Donna with copy for membership insert in the CLE catalog	Emily
10/7/05		Contact Capital and OSU and see if the Columbus Bar could set-up a table at the new bar admittee function.	Emily/Lara
10/14/05		Publish sustaining members in DR.	Jessica/ Emily
10/14/05		Inform. CLE and the front desk about the membership promotion and send info. to administrators of firms – letting them know of the promotion.	Emily
11/3/05		Membership Report.	Emily
11/4/05		Bar Admissions result due	Becky
11/4/05		Publish new members in DR.	Jessica/ Becky
11/4/05		Process Membership cards and stickers	Emily
11/4/05		Send letters to all new members.	Emily
11/4/05		Send notes to all sustaining members.	Becky
11/4/05		Produce PACO Membership list	Becky
11/11/05		Send packets to all new admittees	Team
12/2/05		Membership Report.	Emily
12/2/05		Publish new members in DR.	Jessica/ Becky
12/2/05		Process Membership cards and stickers	Emily
12/2/05		Send letters to all new members.	Emily
12/2/05		Send notes to all sustaining members.	Becky
12/2/05		Produce PACO Membership list	Becky
12/9/05		Prepare for pro-rated membership	Emily
12/16/05		Change website to include pro-rated application.	Jessica/ Emily