



Seven Steps to a Successful Club Visit

1. Schedule the visit with the expectation that the club will provide information.

When you let the club know you want to schedule a visit, send them (all the club officers) the blank report (<http://bit.ly/clubvisit>) and ask them to fill out step 4 before your visit. You could say, assumptively, "I'm sure you have already gained commitments from your members for educational goals, so it should be easy to fill out. If you haven't done so, please do so prior to my visit." Some will, a lot won't, but it's the first attempt. Also, let them know that you would like a few minutes after the meeting to talk with the club president and any other officers who can stay to get information for the report.

2. Dig up Data.

- Check the club DCP History report (<http://mikeraffety.com/DCPhistory.cgi>) to get names for people who actually achieved an award. Also, study the report for trends and strengths/weaknesses that you can get more information on. Numbers don't lie, but they don't tell the whole story. Get the story behind the numbers.
- Check the listing at TI (put in the club name or number in the "search options" area of "find a club.")
- Look at the club website to check if information is current and for engagement (pictures of members, for example)

3. **Remind them.** The day or two prior to your visit, send the blank report again, and remind them that you will go over the report with them following the meeting, so you need them to provide the information for Step 4. You can suggest that if they don't have the info, that a few minutes of the meeting be allotted to getting commitments for educational awards.

4. **Observe. Fill out. Get information.** At the meeting, observe and make notes. After the meeting, talk with the President and other officers to obtain the rest of the information. If they don't have information, ask for their best guess. Find out if they need assistance. Do they need to be coached on how to get commitments? Do members see the value of the educational program? Get a date, within a week, that they will get you information. Tell them you will follow up only once to request the information.

5. **Follow up** a couple of days after the date for them to respond has passed, if they have not provided info. After a few more days, just fill out the report with "Club did not provide information" for areas on which you don't have details.

6. **Submit the report online** within 2 weeks of the club visit. Aim to complete all your visits 30 days before the deadline (Deadline: Nov. 30 for the first round and May 31 for the second round).

7. **Follow up on areas needing attention**, providing resources and guidance. Consult with your Division Director for assistance.