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# TRAINING HANDOUTS

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## Little SIR



Prepared by: Ed Benson

## Little Sir Training

**As a result of today's training session I will learn the following:**

Got It	General Session	Got It	Workshop Session
	Memorize the SIR Mission Statement		Understand the role of the Big Sir
	Characteristics of successful SIR branches		The necessity and technique of developing branch goals and action plans
	The necessity and technique of developing branch goals and action plans		The necessity of enthusiastically embracing all elements of RAMP, its leaders and committees
	The necessity of enthusiastically embracing all elements of RAMP, its leaders and committees		The need for establishing agendas for the BEC meeting and the branch luncheon
	The usefulness of the sirinc.org website and its basic navigation		The importance of the branch Nominating Committee and it's increase in focus to succession planning
	How to self-assess potential vulnerabilities facing your branch		The requirement for the branch Audit Committee
	Understand and demonstrate the SIR Leadership Expectations		How to analyze Form 28
	Use the self-assessment to determine how I am demonstrating the SIR Leadership Expectations		How to analyze Form 27
	Use the Recruiting Leaders and Team Members process in my internal recruiting efforts		The necessity of attending the SIR Annual Meeting
			How to find and use the Branch Schedule of Operations
			How to find and use the SIR Leader's Guide
			How to successfully obtain luncheon speakers

## **JOB DESCRIPTION FOR BRANCH LITTLE SIR**

**The Mission of Sons in Retirement is to improve the lives of our members through fun activities and events while creating friends for life.**

### **POSITION DESCRIPTION**

The Big Sir is the chief executive officer of the branch, a corporation under the laws of the State of California. The primary purpose of the Little Sir position is to prepare to become an effective Big Sir.

### **PRIMARY RESPONSIBILITIES**

**As Little Sir, you need to prepare yourself to:**

Lead all of the affairs of the Branch, subject to SIR bylaws and rules, Branch regulations and the control of the Branch Executive Committee.

Ensure the BEC annually sets reasonable membership and other goals that address issues of importance to branch improvement and long-term branch survival.

Embrace RAMP (Recruiting, Activities, Member Relations, and Publicity/Image), placing emphasis on establishing chairmen of committees for each function.

Preside at all meetings of the Branch and its Executive Committee.

Appoint chairmen of Branch administrative and activity committees to serve during your term, including an Auditing Committee and Nominating Committee following your election to Big Sir and prior to the end of your Little Sir year.

Understand the responsibilities of all committees.

Ensure the branch has an officer and key leader succession plan, and that back-ups are trained for key leadership positions.

Execute any document or other instrument authorized by the State Board.

Represent the Branch at the Annual Meeting of the Members of the Corporation should the Big Sir be unable to attend, and vote on propositions to amend the Branch and Corporate Bylaws and in the election of Corporate Officers.

Vote in the election of the Area Governor as Little Sir you will become a member of his Area's Election Committee.

Ensure that Branch officers and committee chairmen receive necessary training for their positions.

Perform other tasks and duties as assigned by the Big Sir.

**SIR Leader Expectations, Skills and Knowledge Required:**

- Understand the Bylaws, Standing Rules and SIR Leaders Guide applicable to branch operations
- Understand the SIR Leader Expectations and work to display them at the "Outstanding" level.
- Utilize goal setting, action planning and follow-up principles effectively
- Provide positive and negative feedback effectively and when appropriate
- Understand and support the principles of RAMP
- Ability to lead SIR training at the branch
- Lead branch meetings effectively
- Build close relationships with key branch leaders and volunteers
- Apply effective leader and volunteer recruiting principles
- Ability to review branch reports to assess how branch is performing
- Use common word processing, spreadsheet, presentation and email software
- Understand the SIR organization and whom to contact for specific information and advice
- Knowledge of The contents of the SIRINC.ORG website with particular emphasis on the Branch Information Section.

**Estimated additional time needed for this position beyond Sir membership:**

About eight hours a month for email correspondence, phone calls, problem solving, decision making, occasional meetings and record keeping

## Little Sir Tip Sheet

### **2.1. Two key things that make a difference between growth and non-growth branches?**

- Leadership
- Followership

### **2.2. What are four things you can do to embrace RAMP at your branch?**

- **Fill** the RAMP roles with an identified leader
- **Listen** to your RAMP leaders, and support them
- **Review** all the RAMP videos, learning points and potential goals and actions on the sirinc.org website
- **Identify** actions from the RAMP Toolkit that will work for your branch

### **2.3. Setting branch goals and action plans**

You can use the Branch Assessment and Goal and Action Planning Worksheet to improve your branch.

1. Have your BEC complete the Branch Assessment
2. Discuss everyone's ratings and reconcile them
3. Complete the Goal Worksheet by setting goals to overcome identified areas of improvement
4. Use the RAMP Toolkit to stimulate thinking about goals and action plans you could establish that would improve your branch
5. Follow up on action planning monthly or bi-monthly, and revise things that don't seem to be working

### **2.4. Understanding Form 28, Sons in Retirement Monthly Cash Report**

Form 28 is:

- Required by State and Federal IRS organizations to keep our non-profit tax status
- Submitted by the tenth of the month
- Distributed as specified on the bottom of the form

Big Sirs should review the following (a copy of the form is included in Handout XX)

1. Do the receipts in the General Accounts seem correct; are they in line with usual and expected monthly receipts?
2. You, as the Big Sir approve many of the Branch General Expenses. Do the numbers in the General Account Disbursements reflect your recollection of what you have approved?
3. In the Custodial Accounts, do the receipts for the Monthly Luncheon and other activities seem in line with the associated disbursements?.
4. Are other Custodial Accounts in the range of your expectations?

5. Does the total of the Cash Elements agree with the Ending Cash Balance for the month?
6. Does the number of Active Members agree with the count on Form 27?

### **2.5. Establishing the Branch budget and necessary member contributions/dues**

Budgets should be established annually, at the January BEC meeting. Items to consider include the following:

1. What is the branch expected revenue from contributions, dues or any other sources?
2. What expenses are we expected to incur from printing, copying office supplies, postage, mail box rental, officers' mileage, lodging, meal expenses, State Board Pro-Rata Assessments (\$6.00 per year paid quarterly), annual meeting assessment (currently \$35)?
3. What other expenses are we expected to incur, i.e. lunches given away (from drawings, birthdays, speakers), guest and new member incentives, advertising, equipment purchase, equipment rental?
4. Will the branch be defraying a modest amount of members' luncheon cost to make change giving easier, i.e. luncheon cost is \$17 to the branch but only \$15 is charged the member to make change giving easier?
5. Is there enough revenue from all sources to defray all anticipated expenses plus a modest cushion for unforeseen expenses?
6. If there is a shortfall, how will it be covered?

### **2.6 Understanding the importance of the Audit Committee**

- Appoint your Audit Committee NOW at least by year end
- Two or more members who cannot have been a 2017 officer or BEC member
- Audit covers the calendar year
- **Audits are to include the Branch and all activities such as golf and bowling**
- Form 29, Branch Audit Report must be completed by February 10
- Form 29 is self-explanatory

### **2.7. Leading the branch BEC and luncheon meetings**

Don't waste time: keep things moving. Sample agendas are included in Handouts 5 and 6

### **2.8 How you and your Nominating Committee can end your scramble for Officers and other key Branch roles.**

- Appoint respected branch members with lots of acquaintances that cover the full range of branch activities
- Make sure they view the Selecting Leaders video
- Make nominating a year round process, not an event
- Download all the appropriate role descriptions from sirinc.org
- Build a new member list with the member's work and branch background

- Develop a “Future Branch Leaders List” and discuss it with the candidates
- Apply the SIR Leadership Expectations in candidate selection
- Ensure they apply the Recruiting Leaders and Team Members process

## **2.9. Using Form 27, Monthly Branch Membership Report**

You are responsible for ensuring the monthly completion and distribution of State Form 27, Monthly Branch Membership Report. **It is due the 10<sup>th</sup> of the following month**, and it is sent to [sirstateform27@gmail.com](mailto:sirstateform27@gmail.com), your BEC, Branch RAMP Committee Chairmen, Area Governor, and Regional Director.

Form 27 is YOUR form to provide you with Branch operating statistics to measure how your branch is doing

Also, the Form 27 data from all branches is summarized by a SIRInc committee and published quarterly in the “Membership Statistics” section of the [sirinc.org](http://sirinc.org) website.

- Useful reports and data summaries can only be provided if every branch accurately completes its Form 27 data and reports it routinely, and on time.

Refer to Handout 7 and follow along. Some items to remember:

- The previous year's columns on the left. These must be completed to provide you with your branch's trend data
- Also note the far right column labeled, “Branch Goal.” **There are two minimum goals.**
  - > **Line 4**, goal must at least be plus one from last December's Number of Active Members, and
  - > **Line 9**, Percent of Active Members in Attendance must be 70%.
  - > **Line 2**, You also need to set a goal for Line 2, Number of Members In. The method of setting this goal is in the shaded box below Line 7.
  - > **Line 10**, Guests, needs a goal, and that is calculated following the methodology in the shaded box below it.

How to review Form 27

**Now, follow along on Handout 7, and take notes directly on the Form.**

- The starting point of your review is **Line 4** for the current month.
  - > Is membership on track to meet your goal? If not, why not?
  - > Are you getting enough guests?
  - > Is your guest to member conversion rate too low, or are you losing members at a greater rate than previous years?
    - > **If so, what can you do about it?** Challenge your RAMP Chairmen to come up with solutions.
- How does your total number of activities and number of coed activities compare to previous years (Lines 5 and 6, respectively).
- Is your group of couples activities growing?

- **If not, get together with your overall branch Activity Chairman and ask him what can be done.** We've given him a number of potential actions in his State training.
- How does your Line 9, Percent of Active Members in Attendance compare to your goal. > is it lagging? **If so, get your Member Relations and Luncheon Program Chairmen together, ask them for solutions.**
- Median branch age is important.
  - > If it's growing significantly, it's likely that your recruiting of new members is lagging **Challenge your Recruiting and Publicity and Image Chairmen to discover new ways of promoting the branch to a younger group of potential members.**

## **2.10. Attending the SIR annual meeting**

Attend it or have your BEC appoint a substitute. It is important that all branches be represented.

## **2.11. The Importance of Recognition**

### **The Honorary Life Membership Award – SIR's most prestigious award**

- Can be awarded either by the State or the Branch
- Form 45, Application for Honorary Life Membership is to be completed also with a supplemental resume of the applicant's service to the Branch and SIR
- Nominee must have clearly earned it through faithful and outstanding service to the organization for five years or more
- Nomination undergoes critical review and scrutiny during the approval process
- Nomination requires a two-thirds vote of the BEC
- Non-SIR activities and achievements are immaterial
- Approval of Form 45, Application for Honorary Life Membership shall not result in the number of HLMs in a Branch with less than 100 members being more than two, or more than two percent of the total active membership for a Branch with 100 or more active members, on the date of application
- Form 45 and supporting documents are forwarded to the Area Governor and Regional Director for their approval before the form is presented to the State President for the final approval
- When a branch HLM has completed ten years as an HLM, he is elevated to Senior HLM status and the branch is allowed to replace him with a new HLM
- *The award shall be presented with appropriate honor*

Your Area Governor can provide you with assistance.

### **Senior, Super Senior and Century SIR Certificates – For members reaching ages 90, 95 and 100**

- The Big Sir of the Branch must submit a Form 6—Senior Certificate Order For, directly to the State Certificates Chairman for processing.
- The Certificate will be sent back to the Big Sir for framing.
- The Big Sir should present the Senior Certificate, contact the Area Governor for presentation of the Super Senior Certificate, and the Regional Director for presentation



of the Century Certificate.

- The awards shall be presented at a suitable SIR function or regular monthly luncheon.

## **Other Branch Honors**

Recognition is one of the only reward “levers” we have. It is a very important tool. Your branch might consider a

- Special award or honor for long service as an activity chairman, newsletter editor, a RAMP chairman, etc.
- Sir of the Year award to the member who has done something really special during the year to move the branch forward

We encourage such awards; however, make sure that the honor is well justified and defensible to all members to avoid feelings of favoritism and ill-will. If such honors are granted or if your branch wishes to implement some, it is best to establish and follow a well-defined process. The State Growth & Membership Committee can provide you assistance.

## **2.12 The Importance of Communication**

### **Communication within the Branch**

By Rule, Branches should have a monthly bulletin or other means of communication to transmit information to Branch members.”

Branch bulletins should include the following:

- Lead with the Big Sir monthly letter to the membership. Here is your chance to bring all the members up to date on key branch matters. Don't forget to recognize members who have done things out of the ordinary. Also, it is a great opportunity to remind members to bring guests and publicize other RAMP accomplishments. The Big Sir letter is one of the most read articles in most branch bulletins.
- Information regarding the upcoming speaker
- Identification of the branch RAMP Chairmen
- An article by the Recruiting Chairman to inform members where the branch stands against its net membership and guest goals and any special programs coming up
- Other RAMP Chairmen articles about important happenings in their areas
- Brief articles by Activity Chairmen to remind members of upcoming events
- A brief Treasurer's report on branch income and expenses
- Remarks and suggestions received from the table comment cards
- Other important branch announcement such as the luncheon menu, absence call in rules, update on members ill or hospitalized, etc.
- Pictures of new members with a brief biography
- Pictures of members receiving awards **or** just having fun

Branches have also found blast all member emails to be effective, and they are timely.

### **Communications with Sirs outside the branch**

The Area Governor is required to call a meeting of his Big Sirs after each State Board meeting

to:

- Communicate the results of the meeting
- Discuss actions that need to be taken
- Foster inter-branch contact, peer advice and problem-solving
- Communicate branch best practices

When a branch developed a best practice needs to be communicated or problems arise that would benefit from advice of parties outside the branch, the Big Sir should bring the Area Governor into the loop. Due to the nature of the Area Governor's role, he has a much wider range of useful contacts.

Finally, the Big Sir needs to be responsive to communications from the Area Governor, Region Director and State leaders and, of course, that's a two way street. Remember that we're all in this together, and we need to be focused on common goals.

### ***2.13. Using the Schedule of Operations and meeting State requirements***

Annually, the State Secretary publishes a Schedule of Branch Operations. It highlights branch requirements for each month for the Big Sir, Secretary and Treasurer. It is found in the SIR Leader's Guide and on the [sirinc.org](http://sirinc.org) website under Member's Information. Once on that page, go to the middle column labeled, Branch Information, and under SIR Branch Officer Guides click on Schedule of Branch Operations.

The Branch Secretary should publish the Schedule of Operations for the upcoming month and the month after in his distributed BEC minutes.

### ***2.14. Using the SIR Leader's Guide***

Annually, a SIR Leader's Guide is published to acquaint SIR leaders with the critical portions of their roles. It can be found by clicking on the big blue button at the top of the Member Information page. This will take you directly to the most recent Sir Leaders Guide.

### ***2.15. Navigating the [www.sirinc.org](http://www.sirinc.org) website***

This was covered at length in the general meeting. Should you have questions, contact your Area Governor.

### ***2.16. How to successfully obtain luncheon speakers***

Here are four tips:

- Form a Speaker's Committee so you don't have to do all the work yourself
- Determine if any of your members belong to service clubs IE. Rotary, Kiwanis, etc. These groups meet weekly and have a speaker at most meetings. If you don't have such members, get acquainted with the service club leaders.
- Work with your Area Governor to develop an Area Speaker's List
- Watch your local newspaper for interesting articles by local writers

**Handout LS 4**

<b>FORM 28, SONS IN RETIREMENT MONTHLY CASH REPORT</b>			Branch No.-		
Branch No. -	Area -		Region -		
Month -	Year -		<b>Month</b>	<b>YTD</b>	
<b>BEGINNING CASH BALANCE (Total Cash)</b>			<b>1</b>		

<b>1. GENERAL ACCOUNTS</b>				
Receipts				
101 Contributions				
102 Interest				
103 Other				
Subtotal General Receipts		<b>2</b>	<b>1. Seem Correct?</b>	
<b>2. Disbursements</b>				
201 Printing, Supplies etc				
202 Postage				
203 Officers' Expense				
204 Guest Expense				
205 State Board Pro Rata Assessments				
206 Other -				
207 Other -				
Subtotal General Disbursements		<b>3</b>	<b>2. Seem Correct?</b>	
NET GENERAL gain / (loss)		<b>4 (2-3)</b>		

<b>3. CUSTODIAL ACCOUNTS</b>				
Receipts				
301 Monthly Luncheon			<b>3. Seem Correct?</b>	
302 Special Activities				
303 Travel				
304 Bowling				
305 Golf				
306 Rooster Items				
307 Other				
308 Other				
Subtotal Custodial Receipts		<b>5</b>	<b>4. Seem Correct?</b>	
Disbursements				
401 Monthly Luncheon			<b>3. Seem Correct?</b>	
402 Special Activities				
403 Travel				
404 Bowling				
405 Golf				
406 Rooster Purchases				
407 Other				
Subtotal Custodial Disbursements		<b>6</b>	<b>4. Seem Correct?</b>	
<b>4. NET CUSTODIAL gain / (loss)</b>		<b>7 (5-6)</b>		

<b>ENDING CASH BALANCE (Total Cash)</b>			<b>8 (1+4+7)</b>	<b>5. Agree?</b>	
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<b>CASH ELEMENTS</b>	
Checking	
Savings	
Other	
<b>Total</b>	<b>5. Agree?</b>

<b>MEMBERSHIP</b>	
Activ	<b>6. Agree Form 27</b>
Include HLM's	

**Handout LS 5**

## **BEC Agenda for \_\_\_\_\_**

**Call to order at 9:00 a.m.** – Secretary establishes quorum

**Big Sir Welcome** – Recognition of visitors and guests

### **1. OFFICER REPORTS**

#### **Secretary's Report**

- Review of previous month's minutes and upcoming two month's Schedule of Operations

#### **Big Sir Report**

- Review of Form 27
- Approval of September and October contract with caterer
- Announcement of officer slate for 2016
- Showing of our video at lunch

#### **Little Sir Report**

- Report on area(s) he is responsible for

#### **Treasurer Report**

- Approve Form 28 for month
- Update on dues status

#### **Membership Secretary Report**

- Approve monthly Membership report

#### **Attendance Secretary Report**

- Approve monthly Attendance and Delinquencies reports

### **2. COMMITTEE REPORTS**

#### **Recruiting Committee**

- New members to date vs. goal
- Guests to date vs. goal
- Recruitment table at local golf expo
- Status of SIR Cards

#### **Publicity Committee**

- Report on Senior Center Alliance – Two activities published in the Hotline, they will publish couples golf and Sirs in the Garden in their monthly publication. This will be ongoing. The President will be a guest today; please get a free lunch ticket for him.

#### **Activity Committee**

- Update on activities
- Approval of new activity

### **Member Relations Committee**

- Findings on non-returning guests for February 2015

### **Member Feedback**

- Summary of comments from table comment cards at last luncheon

### **3. OLD BUSINESS**

#### **Coed Newsletter for our Spouses/Partners**

- Ladies' Day survey results
- Should it be continued?
- If not continued, should we publish one for family in January highlighting all couples activities?

#### **Red Dot Update**

- **Get out and meet them**

### **4. NEW BUSINESS**

- Should we conduct a Branch communications survey?
- Special table for 2 to 6 month members. Something to consider
- Greeter and new member display. Picture and written bio.
- 2015 Nominating Committee Report deferred to August BEC meeting due to long July agenda.

### **5. 10:00 a.m. – INDUCTION OF NEW MEMBERS**

- Sponsor role and swearing in

### **10:30 CLOSE & ADJOURN**

- Next meeting, August 10, 2015, 9:00 am

## Handout LS 6

### Luncheon Agenda – \_\_\_\_\_

#### 11:30

- Call to Order, Welcome and thanks for coming

#### 11:31

1. Moment of silence for Joe Smith, who passed on July 8
2. Invocation

#### 11:32

1. Pledge of Allegiance
2. Break for lunch – 40 minutes
3. Show our Branch Video while lunch is being served

#### 11:33 Lunch until 12:13

#### 12:13 Big Sir Report.

- The greeters for the July luncheon are Terry Norton and Dan Smith
- Introduce guests and sponsors
- Introduce other guests
- Comment on guest and member goal banners
- Thanks for Ladies' Day Committee
- Spring Sir Happenings is out – go to [sirinc.org](http://sirinc.org)
- New HLM
- Feedback on video. Do you want to see it again? If so, after lunch
- Officer and Director slate for 2016
- Membership Recognition announcement

LAST_NAME	PERSON_NICK_NAME	SENIORITY YRS
Richard	Glen	20
Jones	Bob	20
Long	Dick	15
Johnson	Harold	15
Nelson	Fred	10
Lutz	Cal	10
Karg	Joe	10
Bingham	Gene	10

- Joke

**12:35**

- Sunshine Committee report

**12:37**

- Luncheon Drawing – draw two
- Members who brought guests in last six months drawing
- Birthday Boys – draw two for each month
- Sing Happy Birthday

**12:45**

- Introduce new members

**12:50**

- Activity announcements – Branch Activity Coordinator

**1:00**

- Little Sir to introduce our speaker

**1:28**

- God Bless America

**1:29**

- Badges in boxes
- Come up front and give the new guys a BIG welcome
- Do you want to see the Branch Video again?
- Next meeting date
- Adjourn

**FORM 27 - MONTHLY BRANCH MEMBERSHIP REPORT**

Blue cells are calculated fields; passworded and locked.

Year:  Report Month:  Region:  Area:  Branch:

MEMBERSHIP Line Description	Previous Years												Min Goal	Branch Goal
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
1 ACTIVE MEMBERS LAST MONTH (≠ Line 4 last month)														
2 NUMBER OF MEMBERS IN													0	1
3 NUMBER OF MEMBERS OUT (ATTRITION)													0	
4 NUMBER OF ACTIVE MEMBERS (Lines 1+2-3)														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**

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

Membership change this year: **0**

**LUNCHEON ATTENDANCE**

Enter "LDL" above Ladies Day months ==>

Line Description	Previous Years												Year %	Min Goal	Branch Goal
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec			
8 ACTIVE BRANCH MEMBERS IN ATTENDANCE															
9 PERCENT OF ACTIVE MEMBERS IN ATTENDANCE														70%	
10 GUESTS (Guests are potential members only)													0	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 = **0.0 guests to add 1 new member**

LAST MONTH'S FORM 27 REVIEWED BY BEC?

**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 (Rule 167)

**SUBMITTED BY:**

**Title**

**MEETING DATE:**

**Phone #**