

Leadership Training

Big SIR and Little SIR 2025 Training Session



Prepared By

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SIR Mission Statement, Vision, and Expectations

Our Mission

The Mission of SIR is to enrich the lives of our members through fun activities, luncheons, and events – while making friends for life

Our Vision

To become the best active men's organization in Northern and Central California by improving longevity through providing opportunities for physical, mental and social engagement

The Four Member Expectations

As Big SIR and Little SIR, we look to you to convey to every new member as you welcome them into your Branch, our four member expectations.

1. Of being a friendly sociable guy; 2. Of participating in our activities and attending our luncheons and events; 3. Of volunteering when asked (as your interests and capabilities will allow); 4. And, to bring guests to perpetuate; and enhance the diversity of our Branch.

Today's Session on the Positions of Big SIR and Little SIR has been prepared with the following Goals in mind:

- Understanding Your Role as Big SIR and / or Little SIR
- Develop Techniques for Setting Branch Goals and Action Plans
- Understanding the Value and Need for BEC and Meeting Agenda
- Understanding the importance of your Nominating Committee and Succession Planning and have a working knowledge of your Audit Committee
- Understanding and Embracing RAMP
- Utilizing the sirinc.org website
- Review Leadership Skills and Expectations
- Understanding and Use of Forms 28
- Utilizing the Branch Schedule of Operations and the SIR Leader's Guide
- Importance of Attending the SIR Annual Meeting

Congratulations on Your Elections to Big SIR and Little SIR

As Big SIR you are the Chief Executive Officer “the Leader” of your Branch, which is a sub-corporation of SIR Inc., a corporation under the laws of the State of California.

As Little SIR you are the Assistant Chief Executive Officer working directly under the Big SIR.



As Big SIR you are the one leading your Branch and providing direction going forward

As Little SIR you assists and supports the Big SIR in the operations and direction of the Branch

Gentlemen, you are to be commended for your dedication to the SIR organization and to your Branch

Primary Duties of the Big SIR and Little SIR

Big SIR

- The Big SIR is responsible for leading all of the affairs of his Branch. SIR bylaws, policies, procedures, rules, regulations, and guidelines provide for consistency in the running of Branches State wide and provide guidance to the Big SIR.
- The Big SIR chairs and facilitates the Branch Executive Committee (BEC) and Branch Lunch meetings, including Special Events. Including Zoom Meetings when necessary.
- The Big SIR has responsibility for developing and preparing Meeting Agendas for both the BEC and Lunch or Special Meetings of the Branch. (Except on occasion when performed by the Little SIR.)

Sample BEC and Lunch Meeting Agendas will be shown later .

Little SIR

- The Little SIR is responsible for assisting the Big SIR in the leading of the BEC and monthly luncheon meetings. In the absence of the Big SIR you preside over these meetings.
- The Little SIR conducts one each of the BEC and luncheon meetings during the year to gain insight and experience prior to becoming Big SIR.
- Assist and provide input, when requested, to the Big SIR in the preparation of BEC and Luncheon or Special Meeting Agenda.
- Support all of the affairs of the Big SIR and the Branch in accordance with SIR by-laws, rules, policies, procedures, and Branch regulations.

Primary Duties of the Big SIR and Little SIR (continued)

Big SIR

- The Big SIR appoints Directors and Chairmen of Branch Administrative and Activity Committees. Such appointments should consider any recommendations received from the Branch Nominating Committee.

Note: The Big SIR is required to ensure that the Nominating Committee has proposed candidates that are capable and willing to fulfill the positions to which they are being assigned. These appointees serve for the period of their term at the discretion of the Big SIR.

- Develop, with input from the BEC, a set of reasonable goals along with plans that address items important to the improvement of the Branch. This includes membership goals and a succession plan for Branch leadership.

Note: A succession plan looking forward two to three years is preferred. Develop back-up personnel for key positions.

Little SIR

- Assist the Big SIR, when requested, in the selection of Directors and Chairmen.
- The Little SIR shall assist the Big SIR in developing a set of reasonable goals along with a plan that addresses items important to the improvement of the Branch. Including membership goals and a succession plan for Branch leadership.

Primary Duties of the Big SIR and Little SIR (continued)



Big SIR

Be aware of and oversee work of each BEC Officer, Director and Chairmen. Maintain regular and frequent communication with them. You are an ex-officio member of all committees with the exception of the Nominating and Travel Committees which you are not permitted to serve on by rule.

- Following your election to Big SIR, and **before your year starts**, establish an Auditing Committee and a Nominating Committee.

Little SIR

- Support all of the affairs of the Big SIR and the Branch in accordance with SIR by-laws, rules, policies, procedures, and Branch regulations.
- The Little SIR arranges for and ensures that a monthly guest speaker is scheduled and the bio-information communicated in advance to the BEC, Publicity Chairman, and the Newsletter Editor. The Little SIR chairs and hosts Branch Special Events.
- The Little SIR introduces guest speakers at luncheon meetings. He provides a certificate of appreciation or a token of thanks to the speaker.

Primary Duties of the Big SIR and Little SIR (continued)

Big SIR

- The Big SIR represents his Branch at the SIR Annual Meeting of the Members of the Corporation. The Big SIR shall vote on propositions to amend Branch and Corporate Bylaws as well as voting in the election of Corporate (State) Officers. The Big SIR executes documents or other instruments authorized by the State Board.
- The Big SIR is a member of his Area's Election Committee. He submits names of candidates for Area Representative as developed by the BEC and votes on behalf of his Branch in such elections.
- Promote the development and training of Branch Officers, Directors, and Chairmen and being a part of the Branch succession plan.

Little SIR

- The Little SIR, with the Big SIR, attends the SIR Annual Meeting of the Members of the Corporation but does not have voting rights.
- The Little SIR is a member of his Area's Election Committee. He submits names of candidates for Area Representative as developed by the BEC and votes on behalf of his Branch in such elections.
- Assist in the development and training of Branch Officers, Directors, and Chairmen and being a part of the Branch succession plan.

Primary Duties of the Big SIR and Little SIR (continued)

- The Big SIR shall emphasize and promote the execution of RAMP.
(Recruiting, Activities, Member Relations, and Publicity / Image).
- The Big SIR should be familiar with accessing the sirinc.org website and the benefits of the vast amounts of information available to Branches. The Big SIR should also make himself familiar with the SIR bylaws, policies, procedures, rules, and guidelines as to how they apply to running his Branch.
- The Big SIR shall abide by and follow the Annual SIR Schedule of Branch Operations.
- The Big SIR authors a monthly article for the Branch newsletter covering items of interest to Branch members and special recognitions, etc.
- The Little SIR shall assist the Big SIR in emphasizing and promoting the execution of RAMP.
(Recruiting, Activities, Member Relations, and Publicity / Image).
- The Little SIR should be familiar with accessing the sirinc.org website and the benefits of the vast amounts of information available to Branches. The Little SIR should also make himself familiar with the SIR bylaws, policies, procedures, rules, and guidelines as to how they apply to running his Branch.
- The Little SIR shall abide by and follow the Annual SIR Schedule of Branch Operations.
- The Little SIR authors a monthly article for the Branch newsletter covering items of interest to Branch members upcoming events, guest speakers, etc.

Big SIR and Little SIR Skills, Knowledge, and Expectations

The following are Key to your Success as Big SIR and / or Little SIR and the Success of you Branch:

- Be able to navigate through the SIR Bylaws, Policies, Procedures, Standing Rules, and Guidelines as they apply to Branch operations.
- Be able to navigate through the sirinc.org website and extract information relevant to your Branch.
- Be able to use common word processing, spreadsheets, e-mail, as well as presentation software and Zoom as necessary.

Get Help or Assistance if and when you need it. You are not alone.



- Develop good leadership skills and lead by example. Preside over meetings with confidence.
- Execute your duties and responsibilities efficiently and effectively.
- Be prepared. As Big SIR create agendas for all BEC and lunch meetings. Follow those agendas, keep your meetings on track and timely. As Little SIR do the same for your part of meetings.
- Be a good example by showing your enthusiasm for SIR.
- Be a good listener. Encourage new ideas; listen to suggestions from your BEC, Directors, Chairmen, and particularly your membership.
- Be flexible. Modify agendas and meeting topics to accommodate new input and changing interests.
- Encourage participation in the administration of the Branch and in activities.

Big SIR and Little SIR Skills, Knowledge, and Expectations (continued)

- Communicate with your membership with regular information e-mails.
- Be committed to Branch Succession plans.
- Conduct meetings with enthusiasm and humor. Speak clearly and loud enough to be heard. Be succinct, avoid long drawn out topics.
- Greet as many members as you possibly can at each lunch meeting.
Show that you appreciate their participation and support of the Branch by saying hello and shaking their hand. Today it might be a fist bump. Greet them by name.
- Ask for assistance when you need it. You have a crew of Officers, Directors, and Chairmen that are equally committed to the success of your Branch so if you need a little extra help they are there.



Time Commitment

Like anything else, the effort you put into any endeavor will be reflected in the success of that endeavor. Being Big SIR is no different. Remember as Big SIR you are the CEO and Leader of your Branch, as Little SIR you are supporting your Big SIR. The time commitment to being Big SIR or Little SIR will vary depending on your enthusiasm, your support team (BEC), your efficiencies with meeting preparation, and correspondence. There is no correct answer.

Tools and Materials

- The State Secretary publishes an Annual SIR **Schedule of Branch Operations**. It highlights branch requirements for each month for the Big Sir, Little SIR, Secretary and Treasurer. It can be found on the sirinc.org website and in the SIR Leader's Guide under Member's Information. The Big SIR should be familiar with the State requirements and the level of importance of each task as outlined in the Schedule.

Key Items and Actions from the Schedule of Branch Operations:

- **September of the previous year:** Select your Nominating and Audit Committees, your Committee Chairmen, and your RAMP and Administrative support. Confirm in December and be ready prior to January 1st.
- **January:** Communicate Goals and Action Plans. Record in BEC minutes. Secure approval of Branch Activities, record in BEC minutes. *Essential*
- **February:** File Caterer Insurance Form 63 (no Caterer) or 64 (Caterer Insur.). *Critical*
Only needs to be filed once unless there is a change in Caterer or Location.
- **March:** Solicit amendments to SIR By-Laws (if any) and transmit to Area Representative.
- **May:** Receive Slate of Branch Officers from your Nominating Committee.
- **July:** Submit BEC nomination for Area Representative.
- **August:** Attend the SIR State Annual Meeting with your Little SIR.
- **September:** Promote Leadership Training of the Big SIR Elect, Little SIR Elect, the Secretary and Treasurer.
- **November:** Install next year's Officers (November or December).



Quick Reference For Branch State Document Compliance

Required Monthly: (Due by End of Month)

- Form 28 – Monthly Cash Report – Send to Form28Recipient@sirinc.org , Area Representative, Big SIR, & Secretary
- BEC Minutes – Send to Area Representative (Memo only if no BEC meeting held due to special event)
- Newsletter / Bulletin – Send to all Branch Members, Area Big SIR's, Area Representative.

Required Quarterly: (Branch Assessment – Payment)

Payments sent to State Treasurer, masonguy@aol.com

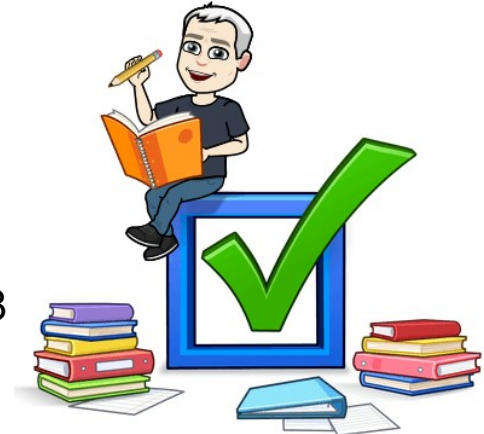
- January – Due 1/15. Based on October membership of the previous year from Form 28
- April – Due 4/15. Based on October membership of the previous year from Form 28
- July – Due 7/15. Based on October membership of the previous year from Form 28
- October – Due 10/15. Based on October membership of the previous year from Form 28

Branch Audit:

- February: Form 29 – Report of Branch Audit including previous years December Form 28

Branch Personnel:

- August: Form 20 - Branch Leadership report to the State. This Form can be filed online and sent to Form20Recipient@sirinc.org . This needs to be filed even if no elections were held. Notify of any changes to Form 20 as or when they occur.



Additional Tools and Materials

There is a great deal of information on the Home page of the sirinc.org website.

There you will find drop-down links for Branch, Area, and State information.

Below is a partial listing of materials available to help you be successful in leading your Branch:

- **Branch Information**
- Branch Locations and Branch Contacts
Learn and Share with other Big SIR
- Branch Leadership:
 - ✓ Branch Job Descriptions
Know the Duties of your BEC
 - ✓ Leaders Guide
Find the Schedule of Branch Operations here
 - ✓ Branch Leadership Training
 - ✓ RAMP Tool Kit
 - ✓ Branch Goals & Assessment
 - ✓ SIR Online Learning
 - ✓ Forms
Find a list of all SIR Forms
- **Area Information**
 - ✓ Area Representative Job Descriptions
 - ✓ Training for Regional Directors
 - ✓ Training for Area Governors
- **State Information**
 - ✓ State Roster
 - ✓ State Meeting Schedule
 - ✓ SIR Manual (Updated through 12-4-2023)
 - ✓ Statewide Activities
 - ✓ Statewide Resources
 - ✓ Forms
Forms are also listed here

Sample BEC Meeting Agenda

Arnold SIR Branch 152 Branch Executive Committee Meeting Agenda

Date: January 16, 2018

Scheduled Time: 10:00am

Call to Order Time:

Location: Snowflake Lodge Arnold, CA

BEC Attendees: Big SIR; Little SIR; Secretary; Asst. Secretary; Treasurer; Asst. Treasurer; Attendance Director; Membership Director; Fellowship Director; Newsletter Editor; Historian, RAMP Chairman; Travel Chairman; Refreshments Chairman; Publicity Director

BEC Absent:

Visitors:

New Members / Sponsors:

Big SIR: Information Items:

Report / Discussion / Action

Form 63 Filing with State SIR
Nominating Committee
Contract with BLS HOA re: menus
SIR State Newsletter "Happenings"

Announcements:

Area Representative – February Visit

Other:

Review of December BEC Board Meeting
Goals and Actions for 2018 / Branch Activities
Dues Collection

Sample Agenda (continued)

Little SIR: Speaker: *Report*
Lunch Menu:
Greeters:
Birthdays:
Other: *Discussion /*
Action

Secretary: Approval of Meeting Minutes: *Discussion / Action*
Approval of 12-19-17 BEC Meeting Minutes
Correspondence:
Report
Notify Area Representative, of transfer of Officer and Director Records
State Filings: *Report / Discussion /*
Action

Treasurer: Form 28: *Report / Discussion / Action*
Annual Audit Committee Report – Form 29
Other Financial:
2018 Budget Outlook

Assistant Treasurer: Drawing Donations: *Report / Discussion / Action*
Other:

Committee Reports

Attendance: (Attendance Director's name)
Report

Lunch Reservations: No. Guests:
Birthday Attendees:
Cultural Entertainment:

Committee Reports (continued)

Membership: (Membership Director's name)
Report

New Members:
Total Membership:
Membership Drive:

Fellowship: (Fellowship Director's name)
Report

Members Status:
Cards Sent:

Newsletter Editor: (Editor' name)

Monthly Article Due Date:
Data Base:
Other:

Special Articles:

Report

Publicity: (Publicity Director's name)

Publications:
Meeting Announcements:

Report

Historian: (Usually Past Big SIR)
Action

Digitizing Branch Records
Covid Waiver and V-Card Records

Report / Discussion /

RAMP Chairman: (RAMP filled by various positions)
Branch Development Ideas

Report

Committee Reports (continued)

Travel Chairman: (Chairman's name)

Report

SIR Web Site Info:

Discussion /

Action

Travel Options: Fliers Available at Meetings

Newsletter Information: Member Travel Stories

Refreshments: (Chairman's name)

Report

Meeting Refreshments:

Special Events:

Accounting / Stock:

Old Business:

Report / Discussion /

Action

Roster: Draft Approval & Delivery via e-mail

New Business:

Report / Discussion /

Action

Branch Self-Assessment Form Review

Establishment of New Activity Groups:

Bocce and Racquetball - Others

Adjourn Meeting:

Sample Lunch Meeting Agenda

Arnold SIR Branch 152 2018 Meeting Agenda

Month / Date: January 16, 2018
Open Meeting: Noon
Pledge of Allegiance: Led by Big SIR or Selected Member
Song: “God Bless America” Led by Big SIR or Selected Member
Invocation: Branch Chaplain

Announcements / Acknowledgements:

Nominating Committee:
Travel: Information for SIR sponsored travel events, sirinc.org web site.
SIR State Newsletter: “Happenings” can be found on sirinc.org web site.

Welcome of Guests: Welcome all guests and acknowledge their host.

Fellowship: Fellowship Director Report

Presentations: Special Recognitions

Annual Audit: Branch Treasurer: Report on Results and overview of Annual Audit
Audit Committee: Acknowledge and Thank Committee Members

Membership: Membership Director Report
Introduce New Members this month.
Membership Update: Current membership status and Membership Drive Contest

Joke / Story: Big SIR

Lunch: Call head table to buffet line then call table numbers or other selection of table order.

Little SIR Agenda: Little SIR takes over meeting after lunch. (Little SIR has his own agenda to follow)
Introduces Speaker
Adjourns Meeting

Important and Frequently Used Forms

There are 49 State SIR Forms that provide a wealth of assistance in the operations of your Branch. These forms come in Word / PDF / and Excel with Instructions, written and/or videos. That being said, there are a few very important and required Forms to be utilized.

Below are the required Forms.

Form 20 – Branch Personnel

Form 28 – Branch Monthly Cash Report

Form 29 – Branch Audit Report

Form 63 – Certification of No Caterer

Form 64 - Insurance Agreement for Outside Contractors (Includes Caterers)

Form 65 – Branch Roster



Consult the Schedule of Operations and the sirinc.org website for submittal dates.

State Expectations of SIR Branches

Each SIR Branch is a separate California Corporation operating under the umbrella of SIR, Inc. - which is also a separate California Corporation. Even though Branches are separate corporations, actions contrary to SIR Bylaws, Policies and Procedures and commonly accepted principles of management can potentially legally damage not only their single Branch, but other SIR Branches and Sir, Inc. as well. Thus, the State organization has established a set of Branch expectations to negate the possibility of a Branch taking inappropriate actions that could endanger all others.

These Expectations are the following:

- Accurate and timely – Form 20, Form 28, Forms 63 or 64, form 65
- Provide Branch monthly bulletins and Board minutes to the Area Representative
- Emphasize and follow the Branch Schedule of Operations
- Fill Branch Officer, Nominating Committee and RAMP positions
- Assist in nominating Area Representatives
- Work to Follow SIR Policies and Procedures
- Attend State meetings including State Training, the Annual Meeting and Town Halls
- Cooperate with the State and other Branches
- Work to increase membership, activities and member satisfaction

Using the SIR Manual

SIR MANUAL COMPOSITION: The SIR Manual is arranged into the following Divisions:

- 1 Preface
- 2 Table of Contents
- 3 Policies/Procedures - Branch
- 4 Policies/Procedures - State.
- 5 Position Descriptions for Branch and State Officers
- 6 Appendices
 - A. Branch and Corporate Bylaws (adopted by eligible voters at Annual Meetings). Bylaw intentions are included within the Policies and Procedures with appropriate Bylaw reference when applicable.
 - B. History
 - C. Articles of Incorporation.
 - D. IRS Exemption Certificate



As Big SIR you should pay particular attention to **Division 3 Section 2 – Branch Membership** (Policies 18 through 26) and **Section 5 – Branch Other** (Policies 27 through 42). These Two Sections are directly related to the running of your Branch. Go through the entire manual at least once so you have a general knowledge of where to find information.

Make A Difference

Every Big SIR and Little SIR want to be successful and make a difference and build their Branch.
Here are some tips on making a difference.

- Be A Good Listener
- Set a Good Example by being Friendly, Energetic, and Attentive to you Members
 - Promote Fellowship and Interaction among your Members
 - Run Efficient Meetings – Be timely, Entertaining, and Enthusiastic
 - Set Reasonable (Attainable) Goals for the year
- Be a Good Communicator – Keep your Members Informed of Activities and Meetings

Congratulation Again on Your Elections
to Big SIR and Little SIR



any questions?

