TRAINING LEADER'S GUIDE

Little Sirs

SONS IN RETIREMENT ©

Training Leader's Guide

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Training Leader's Guide
Little Sir
(Entire section takes about 1:45)

Introduction **(take about 10 minutes)**

Introduce yourself and state your current job with SIR as well as other accomplishments. Then state, "Our training today will take about two hours. There is very little lecture; most training will be done in a participative workshop style. This is a style that received very high reviews from the leaders in last year's training.

The training has five sections:

- **Section I, The Role of the Little Sir**
- **Section 3, Summary and Wrap Up** of today's training.

Handout LS 1 Learning Expectations

Here is what we expect you to learn from today's training:

- **Section 2, Little Sir Job Aids,** where we will discuss the fourteen topics that will prepare you to successfully perform the Big Sir job.

Got It	General Session	Got It	Workshop Session
	Memorize the SIR Mission Statement		Memorize the SIR Mission Statement
	Characteristics of successful SIR branches		Understand your role as the Big Sir
	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 usefulness of the sirinc.org website and its basic navigation		The need for establishing agendas for the BEC meeting and the branch luncheon
	How to self-assess potential vulnerabilities facing your branch		The importance of the branch Nominating Committee and it's increase in focus to succession planning
	Understand and demonstrate the SIR Leadership Expectations		The requirement for the branch Audit Committee
	Use the self-assessment to determine how I am demonstrating		How to analyze Form 28

	the Sir Leadership Expectations		
	Use the Recruiting Leaders and Team Members process in my internal recruiting efforts		How to analyze Form 27
			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

At the end of today's workshop, **I'll expect all the "Got it" boxes to be checked.**

Are there any questions? OK, let's get going

Section 1. The Role of the Little Sir (take about 15 minutes)

Before we launch into your role, let's take a look at SIR's role. It's spelled out in the SIR Mission Statement, and it goes like this:

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

It is important that you keep this statement in mind, and measure any action considered by your branch against it. Does the action being considered:

- Improve the lives of our members,
- Foster fun activities and events, and/or
- Enable the making of friends for life?

If the action doesn't support one or more of these statements, it likely is not one that you want to adopt. You need to memorize this statement, and take the opportunity to keep it in the minds of your branch leaders and members as you lead your branch.

1.1 Obviously the role of the Big Sir is critical to branch success. In the opinion of many, it is the most important role in SIR. The Big Sir is the one who leads the branch, sets the tone, sees that programs are planed and effectively implemented and that all reports are done professionally and submitted on time. As Little Sir, it is your role to learn how to be an effective Big Sir

If you branch is troubled, the Big Sir is the one whose shoulders take the weight. You will not be in it alone, and one key purpose of this training is to point you at resources that can provide help – ***BUT, you have to want and accept it.***

Handout LS 2 Role Description, Little Sir

Your role's responsibilities and the SIR Leader Expectations, skills and knowledge requirements are clearly described in your role description. Let's take a few minutes for each of you to read it.

Allow time for participants to read the description, then ask, **“Who has questions?”** Respond to the questions. Even thought the general session covered the SIR Leader Expectations, participants may ask what is this SIR Leader Valued Behavior stuff? Recap the material covered in the general session and point them t the SIR Leader's Guide where a synopsis is provided.

State, “You had a pre-assignment to view all the RAMP videos on the sirinc.org website. We are assuming you all did that.” We will not be discussing them individually, but they will provide additional background for you as we move through this day's training.

Ask, “Now, is everyone clear about what the Little and Big Sir roles are?” Respond to questions, and create clarity.

Section 2. Sixteen tips to make you the best Big Sir your branch has ever had (take about 1:10)

Now we are going to enter into the fun part of the training. We are going to have an open discussion of the key things you need to know in order to do the Big Sir role effectively.

- **Handout LS 3 Little Sir Tip Sheet**

The Little Sir Tip Sheet provides sixteen sets of tips that will make you the best Big Sir your Branch has ever had. Supplement it with your own notes to remind you of key items you will use back at the branch.

Let's start with the first tip..

2.1. The characteristics of 24 growth branches

In the general session we spoke about the characteristics of 24 growth branches. Here are the demographics of the 24

- Size didn't seem to make a difference as they were a mix of large and small branches. The median size was 135
- They were a mix of urban, retirement and rural geographies
- They had an average net membership increase of three members a year

We concluded, “Success did not depend on location or branch size”

OK, if branch size and location doesn't appear to make a difference between growth and non-growth branches what do you believe is the difference?

The difference is twofold, it is:

- **Leadership** – the guidance furnished by an effective Big Sir and his ability to lead the BEC, Chairmen and members in a common direction toward branch success.

- **Followership** – the willingness of every branch member to demonstrate the SIR Membership Expectations of friendliness, participation, volunteering when asked and bringing guests to perpetuate the branch and offer the SIR experience to others.

Comments?

2.2. Embracing RAMP

You can't just give lip service to RAMP and expect to succeed; it has to be warmly embraced by you and the BEC. Also, you cannot simply focus on one or two areas if you wish to optimize your branch's success. RAMP is a simultaneous equation; all parts need to work together in harmony to get its maximum impact.

We will be training your RAMP leaders later today. Each RAMP chairman will receive two hours of training in his particular area after the general session. Your RAMP leaders and Nominating Committee Chairmen will return with many ideas and suggestions for goals and action items that will make your branch more successful.

What can you do?

1. **Fill the RAMP roles with an identified leader**. In smaller branches he can wear multiple hats, but it is important that someone in your branch focuses on each area. If you can't find a volunteer, assign it to a BEC member without a role or do it yourself.
2. **Listen to your RAMP leaders, and support them.**
3. **Review all the RAMP videos, learning points and potential goals and actions on the sirinc.org website.** The material can be found under Videos and Materials for 2016 RAMP Training. You can find it by clicking on Member Information. Then go to the middle column, Branch Information, click on Branch Training Information then click on Branch Leaders Training 2016 and then on Videos under each RAMP position.
4. **Identify actions that will work for your branch.** Many can be found in the RAMP Toolkit which is found just above Branch Leaders Training 2016.

Generally, you Regional Director and Area Governor have implemented RAMP successfully in their branch and others. Call upon them for help and advice. If they can't personally provide it, they know who to call upon.

OK, who has questions?

2.3. Setting branch goals and action plans

We spoke about this at some length earlier in the general session. We encourage you to w work with your Big Sir to:

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 plans monthly or bi-monthly

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

Understanding your branch finances is very important. For financial review, there are two keys, the Form 28 sent by your Treasurer by the tenth of each month to the SIRinc Assistant Treasurer, and the annual audit. Let's first take a look at Form 28.

Form 28 contains the information required by State and Federal IRS organizations to review the financial information of the individual Branch Corporation and the State Corporation to validate that we constitute an individual corporation with “Non-Profit” tax status. Your branch’s December Form 28 is used to renew your Branch’s individual Tax Exempt Status each year.

Your monthly Form 28 reports are analyzed by your Area Governor and the State SIR throughout the year to assure you are not getting your branch into difficulty and possibly losing your Tax Exempt status.

We have no intention of making our Little Sirs or Big Sirs accountants. However, it is important that you give each month's Form 28 a “sniff” test.

Turn to **Handout LS 4, Form 28, Sons in Retirement Monthly Cash Report**; take a look and follow along **and take notes on:**

1. Do the receipts in the General Accounts seem correct; are they in line with usual and expected monthly receipts?
2. The Big Sir signs most if not all expense accounts for General Account Disbursements. Do the numbers in the form reflect your recollection of what you have approved?
3. In the Custodial Accounts, do the receipts for the Monthly Luncheon seem in line with the Disbursements for the Monthly Luncheon.
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. Consider 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

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

Are your audit responsibilities clear? These Rules are included in Handout BS 8.

2.7. Leading the branch BEC and luncheon meetings

Our members hate to waste time at the BEC meeting and the luncheon. There's little reason that the BEC meeting should take more than an hour and a half and that the actual luncheon and program should take more than two hours. To achieve these time goals you need to be prepared.

Time management is critical. Ask your members how your BEC meeting and the luncheon program can be improved. Consider asking your Member Relations Chairman to put a few comment cards on each luncheon table with some pencils. You'll be surprised what you members will tell you. There are comment card examples on the sirinc.org website. If you can't locate them, ask for help from your Area Governor

It is important that your BEC members come to the meeting prepared to vote. To achieve this you will have to ensure that they receive clear and accurate information before the meeting. It is critically important that you follow an agenda for both meetings you conduct. We have provided two samples to consider. Let's turn to them:

- **Handout BS 5, Sample of BEC Agenda**

- **Handout BS 6, Sample of Luncheon Agenda**

Take a look at the sample agendas. What do you think about the sample agendas? Too detailed? It's necessary!

2.8 Recruiting the “right” guy(s) for the role

This year, as we did last year, we are bringing in the Nominating Committee Chairman for State training. We are working to re-orient the role to one of Branch Succession Leadership.

Here are some tips on how you and your Nominating Committee can end your scramble for Officers and key Branch leaders:

- 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

The second of the two monthly reports you are responsible for sending to the State is Form 27, Monthly Branch Membership Report. It is due the 10th of the following month, and it is sent to sirstateform27@gmail.com, your BEC, Area Governor, Regional Director and Branch RAMP Committee Chairmen.

The statistics from Form 27 are used in two ways:

- The first is to provide a branch with data to help the BEC manage the branch membership.
- Secondly, 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 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.

Let's turn to **Handout LS 7**, a blank Form 27, and follow along as I highlight the important areas on which the Bit Sir, should concentrate:

- Note 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%.
  > 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.

OK, how are you doing so far?

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.

OK, who has questions?

2.10. Attending the SIR annual meeting

Let me quote from the SIR Manual:

RULE 165. The Big Sir shall represent his Branch at the Annual Meeting of the Members of the Corporation and vote on propositions to amend the Branch and Corporate Bylaws and in the election of the prescribed Corporate Officers.

If the Big Sir cannot attend, the Branch shall send another representative (generally the Little Sir or at the least a member of the BEC) as authorized by the Branch BEC to act in the Big Sir's absence.

Now, isn't that pretty clear?

2.11. The Importance of Recognition

We have numerous members who have served SIR faithfully for years, and who have made SIR what it is today. Obviously, we cannot pay these men for their contribution; however, *we certainly can recognize and honor them.* Here are three common ways:

2.11.1. The Honorary Life Membership Award

The peak of recognition in SIR is the awarding of Honorary Life Membership status. The award can be made in two ways:

- By building a case for the award at the branch level, and
- By award for meritorious service to the State.

Rule 24 clearly spells out the meaning of the award:

RULE 24. Honorary Life Membership (HLM). The purpose of the HLM is to recognize exceptional and extraordinary service by a member to SIR. It is not to be treated lightly or awarded merely on the basis of good fellowship. The award will be meaningful if bestowed only to those who, upon careful review and scrutiny, are found to have clearly earned it through faithful and outstanding service to the organization for five years or more. Failure to meet these strict requirements and high standards will destroy the purpose and meaning of the honor and will cause the request for HLM to be rejected.

The Rule clearly spells out the process for nomination and presentation. Here's a summary; however, if you are considering awarding a branch HLM, **read all parts of Rule 24 closely:**

- 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

2.11.2. Senior, Super Senior and Century SIR Certificates

Rule 20.a. is very clear; it states:

SIR active members upon attaining the age of 90 are entitled to be awarded the Senior Sir Certificate; upon attaining the age of 95 are entitled to be awarded the Super Senior Sir Certificate; and upon attaining the age of 100 are entitled to be awarded the Century Sir Certificate.

- 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.

2.11.3. Other Branch Honors

Many branches have local honors for meritorious member service and achievements. Examples might include long service as an activity chairman, newsletter editor, a RAMP chairman, etc. Branches may consider awarding a Sir of the Year award to the member who has done something really special during the year to move the branch forward.

We encourage the award of such honors; however, make sure that the honor is well justified and defendable 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.

2.12 The Importance of Communication

There are two areas of communication that are important to the Big Sir. They are:

- Communication within the branch, and
- Communication with Sirs outside the branch

Let's take the first one...

2.12.1 Communication within the Branch

Rule 270 states, “Communication is necessary within each Branch to keep the members informed of the Branch and Corporate activities. To meet this need, each Branch should have a monthly bulletin or other means of communication to transmit information to Branch members.”

It is critical that your branch has a published monthly bulletin. Here are some guidelines, **and you may find taking notes helpful:**

- Typically the bulletin leads off 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

How does your branch bulletin stack up against these suggestions?

Almost all branches have converted their bulletins from paper to electronic copy. A number of branches have members receiving paper copies pay their pro-rata share of the expense

The branch should also use email blasts to quickly inform/remind members of important events.

2.12.2 Communication with Sirs Outside the Branches

The Area Governor is required to call a meeting of his Big Sirs after each State Board meeting. In this way the results of the meeting can be clearly communicated to all the branches, and discussions can be held regarding any area actions that need to be taken.

This meeting also allows Big Sirs to keep in contact with other Big Sirs in their area. In this way, new ideas and best practices can be communicated between branches. Here Big Sirs can discuss branch problems and opportunities among each other and receive peer advice from numerous points of view.

When a branch developed a best practice needs to be communicated or problems arise that would benefit from advise 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, Little Sir, Secretary and Treasurer. It is found on the 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.

Now does everyone have that written in your notes? That's Branch Information, and under SIR Branch Officer Guides click on Schedule of Branch Operations.

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.

Now does everyone have that written in your notes?

2.15. Navigating the *www.sirinc.org* website

Part Four of the SIR Leader's Guide, titled, “Administrative Information Website” provides examples of the screens that Big and Little Sirs will find very helpful. At a minimum, you should review the section under Branch Improvement, Ideas, Tools and Examples where you will find a large number of articles that will help you build a better branch.

Section 4. Summary and Wrap Up (take about 10 minutes)

Refer the group back to Handout 1, and ask them to check the boxes where they “Get It.”

Ask if there are any of the categories that remain cloudy or unclear, and deal with them.

Then ask them what they thought of the workshop, and how could it be improved. Take notes and forward to Dean Steichen and Ed Benson