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# MEMBERSHIP HANDOUTS

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## Membership Chairman



Prepared by: State Training Committee

Revised by Bob Barnes & Dean Steichen

## **Handout MC 1**

### **JOB DESCRIPTION FOR BRANCH MEMBERSHIP CHAIRMAN**

**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 Branch Membership Chairman is responsible for the processing of new branch membership. He will present to the BEC for vote new potential members, track new and existing members and report on branch changes to their branch and the State.

#### **PRIMARY RESPONSIBILITIES**

- Receive completed and signed applications and bring them to the next BEC Meeting for approval
- Prepare New Member Packets and Name Badges
- Contact approved new members requesting that they attend a luncheon so that they can be inducted into the branch
- Conduct new member orientation
- Introduce new members to the general membership and ask them to say a few words about themselves
- Estimated 1 to 1.5 hours of work at home per new member.
- Maintain database of all member types, active, inactive, HLM
- Report membership details to their Branch at luncheons, at BEC meetings and through the branch website, also provide to the State membership information via Form 27
- Attend membership related meetings arranged by Regional Director and/or Area Governor

#### **SKILLS AND ABILITIES NEEDED**

- Has demonstrated organizational and people skills
- Able to use e-mail, Word Processing, spreadsheets and/or databases
- Works to demonstrate the SIR Leader Valued Behaviors

#### **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

Revised: Training Committee, October 24, 2016

## **Handout MC 2**

## **Membership Worksheet**

***2.1. Position Description:***

***2.2. Membership Worksheet:***

***2.3. Membership Program:***

***2.4. Membership Application:***

***2.5 Membership Acceptance Letter:***

***2.6. Orientation Outline:***

**2.7. Membership Welcome Letter:**

**2.8. Preparing Form 27:**

**2.9. Analyzing Form 27:**

**2.13. Review of Learning Points:**

## Handout MC 3



### Membership Program

The intent of the program below is to give a proven way for successfully using the State Membership material in an effective way that will benefit the incoming members, their Sponsors and the Branch. Like any good program, this requires the full support and commitment of the Big SIR, Little SIR and the entire executive committee. The Big SIR needs to give membership acquisition and retention his highest priority and dedication. Each Branch membership has given the Big SIR the charter of maintaining the health and growth of their Branch when they elected him. This fiduciary responsibility of the Big SIR should become his number one goal during his tenure in office. This implementation document does not replace the State Membership program but does give the mechanics on how to implement it and has the full support and backing of the Growth and Management Committee.

Before we talk about how the program is implemented we should address the area of recruitment.

It is general knowledge in most Branches that new members are needed both for the spirit of the Branch and power for pulling in good speakers. In many cases the solution has been to set quotas or goals. As noble as this is it does not address the who or how to go about it.

All Branches need to make retention part of their program. However, there will always be a certain amount of attrition that can't be helped. What can be helped is acquiring sufficient numbers of new members not only to make up for the attrition but to sustain healthy growth as well.

The candidate rich environments typically are social groups, church groups, or other fraternal groups that the potential Sponsor might be familiar with. Friends, neighbors, and former business associates come in a close second.

The actual start of an active recruitment program starts with the Big SIR and his officers; they need to set the stage. It is difficult to enlist the support of the members if they feel their leaders don't actually believe in it. The Big SIR and his executive committee should be the first to bring in candidates. This can be done by aggressively addressing it in the executive meeting and perhaps even running a small competition among themselves.

The recruitment techniques that have proven less successful have been the ones where you rely

on the candidate to make the first contact, newspaper adds, flyers etc. The recruitment techniques that have proven to have the most success are the personal contact and invitations. Almost all candidates have no knowledge about SIR until approached and the program is explained. Once explained almost all are willing to come as a guest to a luncheon. Once they come to a luncheon eighty percent will become members.

#### The Guest card (the start)

When a guest is brought into the Branch monthly meeting, his Sponsor and the person manning a designated guest registration desk fills out a guest card and hands him a blank application and instructs him where he can turn it in. The guest card has as a minimum his name and the name of his Sponsor. That card is the nucleus of all that is about to happen. After the Big SIR has introduced the guests and their Sponsors during the luncheon meeting the guest card is given to the Membership Chairman or whoever is in charge of the membership program.

#### Follow up,

After two or three days the Membership Chairman will call the Sponsor and first thank him for bringing a guest. It's important to give as much recognition as you can to the Sponsor. An appreciated Sponsor will quite often become a repeat Sponsor. The next thing to ask the Sponsor is if the candidate has a signed application. If he has not, this will give the Membership Chairman the opportunity to call the candidate (with the Sponsors permission). "The call to the candidate should be low key but enthusiastic, first thanking him for coming to the Branch luncheon and then explain a little bit about the SIR organization and the fact there are no initiation fees, annual, or monthly dues. (These are good selling points). Invite the candidate to join the Branch and ask him if he would like to have you mail (or deliver) an application. Don't worry about getting the Sponsors signature on the application; that can come later. Right now the important thing is the application. After a week if you still don't have the application back from the candidate call again, be friendly but persistent.

#### Application approval.

When the applications have been received and reviewed by the Membership Chairman they need to be approved by the executive committee. This normally takes place at the next monthly meeting but some Branches shorten the cycle by getting tentative approval via email. If the Branch has a waiting list the application can still be approved and the candidate notified as such and told he will be inducted into the Branch as soon as there is an opening. Or, if preferred his application can be delayed until there is an opening, either way works.

#### Letters of acceptance.

One of the most lasting impacts of the program is the acceptance and congratulation letters; they should be mailed out immediately after the application approval. You want the letters to give everybody a feeling that they are dealing with a classy organization so the letters should be prompt and printed out on a good high quality bond paper with at least 96 brightness. All of the letters and forms can easily be modified for your Branch. Once modified, they can be quickly revised with a word processor changing the address and names then both the letters and envelopes can then be printed. The first letter is a welcome letter to the new member.

The second letter is for the Sponsor thanking him and includes the Sponsors responsibility letter.

The third letter is to the new members wife explaining the Ladies day events and the travel programs.

#### Badge and records.

After the letters have been sent out:

The Badges can be ordered.

"The Branch membership card created.

The membership data is entered into the Branch database or manual records.

#### Orientation meeting.

This orientation meeting is one of the key elements of the Program.

The letters sent to the new members and his Sponsor sets the time and date for the orientation meeting. The Sponsor is strongly encouraged to join in on the meeting and it is usually held just prior to the regular luncheon meeting when the new candidates will be inducted. If there is not a suitable separate quiet room to hold the meeting then the meeting should be held just prior to the social hour before the rest of the Branch members arrive. A few days prior to the meeting the membership chairman needs to call the Sponsor and verify that both he and his candidate will be there. The purpose of this very important meeting is to welcome the new member and tell him about the SIR organization, the Branch, and encourage his involvement in Branch operations.

#### Membership package.

At the beginning of the orientation meeting the newly to be inducted member is given his package. The package should contain as a minimum.

- A welcoming letter

- SIR history

- Branch history, Branch Roster

- New members sheet (list of new members for the year)

- A copy on the last monthly Branch bulletin

- His badge

- Branch Business cards to handout to friends

- A Blank membership application

#### New member I.D.

It's important to make the new member feel wanted and comfortable in the Branch, especially during the first couple of months. So when he puts on his new badge at the orientation meeting it should have some sort of a temporary sticker on it identifying him as a new member. It is not only the job of the Sponsor but everyone in the executive committee and all branch members to go out of their way to socialize with him and make him feel welcome. This is particularly important until he has his own circle of friends.

#### Induction.

Most Branches have their own induction ceremony so the one we will talk about below is not so much a fixed but rather some of the minimum elements that should be

included for a successful one.

The induction ceremony should be one that is dignified, enlightening and enjoyable. The membership chairman should be the one to run it with the assistance of the Big and Little SIR. It's important to recognize the Sponsor during this process so when the new member is called up front for the swearing in his Sponsor should accompany him. As the candidate and their Sponsor approach the podium from a nearby reserved table the membership chairman may announce that the candidate has been informed of the SIR history and traditions and of the membership rules which he has agreed to. The membership chairman may also use this opportunity to tell a little bit about him. Reading from the membership card he might say where he is living, his wife's name, and some of his interests. Once the candidate (or candidates) is up front the Big SIR can give the SIR rooster pin to the Sponsor and have the Sponsor pin his new member. Both the Big and Little SIR should shake hands with the new member while the Membership chairman completes the swearing in of the new members, welcomes and presents them to the entire Branch.

### Incentives.

The Sponsor recognition is one area that is hard not to overemphasize. Many Branches are using a banner in front of their podiums to list in large letters the names of all the Sponsors and placing a star beside their names for each new member they bring in. After three new member's they are presented with a SIR logo watch, plaque or something like that. Surveys show that established Sponsors and the recent new members bring in most new candidates. Another incentive that is used quite often is to recognize the Sponsor during his candidate's induction by presenting him with an envelope with cash for a free SIR lunch.

### Follow up letter.

Although the new member has been told that he is immediately eligible to become a Sponsor himself it doesn't always stick, so after two months in attendance a follow up letter should be sent out assuring him how glad you are he is in the Branch and reminding him that he can become a Sponsor himself.

### Summary.

The program above has a logical and organized approach that has tested and proven results. If implemented with enthusiasm It will not only be successful but can be as much fun as some of the Branch activities. One man, presumably the Membership Chairman, can accomplish the implementation of the program. However, if there is a membership committee the program can also be broken down into smaller tasks. For instance, one person might handle the letters another the database etc.

As discussed earlier it is very beneficial to get the new member involved in the Branch as quickly as possible. One-way might be to ask him if he would like to be a greeter for a couple of months, in that way he can meet the Branch members and the members meet him.

Food for thought: In one of our most successful Branches, three of its last five Big SIR's have been past membership chairman.



# Handout MC 4

Please return this form to:



## APPLICATION FOR MEMBERSHIP IN OR TRANSFER TO

### SONS IN RETIREMENT, BRANCH \_\_\_\_\_

A Non-Profit Public Benefit Corporation For Retired Men  
Devoted to the Promotion of Independence and Dignity of Retirement

**Please print the following information so we can help you become a part of SIR:**

_____ First Name	_____ Middle Initial or Name	_____ Last Name	_____ Suffix	_____ Nickname	_____ Wife's (or SO's) first name
_____ Home address		_____ City	_____ ZIP	_____ Extension	
_____ Mailing Address ( or "Same")		_____ City	_____ ZIP	_____ Extension	
_____ Area Code	_____ Telephone Number		_____ Email Address (in CAPITAL letters)		
_____ Birth Date	_____ mm	_____ dd	_____ yyyy	_____ Wedding Anniversary	_____ mm    _____ dd    _____ yyyy

I was introduced as a guest at the luncheon meeting during the month of \_\_\_\_\_  
**I am retired from full time employment, and I am aware that regular attendance is essential for continued membership. I understand that I must attend at least one-half of the regular luncheon meetings (Ladies Day or Picnics and Holiday Luncheons are excluded) within the previous twelve consecutive month period, and I must not miss three consecutive regular luncheon meetings without having been excused by contacting the designated Branch Attendance person prior to the meeting date. If you will not be attending a luncheon, notice must be received by noon the \_\_\_\_\_ before the luncheon.**

_____ Applicant's Signature			
_____ Sponsor's Printed Name	_____ Date	_____ Sponsor's Signature	_____ Badge No.

\_\_\_\_\_ I am a new member    <Check whichever applies>    \_\_\_\_\_ I am transferring from Branch # \_\_\_\_\_

How did you hear about Sons In Retirement? \_\_\_\_\_

**Supplying information about your former business or military connection will help us introduce you to new friends and make you aware of our many activities.**

_____ Former Occupation/s	with	_____ Company or Organization	_____ mm	_____ dd	_____ yyyy
			Date Retired		

I prefer to receive my monthly copy of our Branch newsletter: Please check your selection

Electronically  By USPS first class mail (May entail an additional charge)

A Branch official will contact you soon regarding the next step in the process.

Executive Committee acceptance date \_\_\_\_\_ Badge No. assigned \_\_\_\_\_

Membership Chairman \_\_\_\_\_

**Please continue to Activities and Interests on page 2**

Please return this form to:

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### Activities and Interests

Please check those activities and/or interests that you would participate in now or in the future. Our Branch has many of these, and others may be available in our Area. Should an activity not be available, you may be asked if you have interest in sponsoring it in the Branch or Area. That's a great way to meet people. Note that activities that invite couples are in **BOLD**.

- |   |  |   |   |
|---|--|---|---|
| <input type="checkbox"/> Antique Cars             | <input type="checkbox"/> <b>Computers &amp; Tech</b> | <input type="checkbox"/> <b>Golf 9-Holes</b>        | <input type="checkbox"/> <b>Softball</b>      |
| <input type="checkbox"/> Astronomy                | <input type="checkbox"/> <b>Computer Training</b>    | <input type="checkbox"/> <b>Golf 18-Holes</b>       | <input type="checkbox"/> Stamps               |
| <input type="checkbox"/> Backgammon               | <input type="checkbox"/> Cooking (Group)             | <input type="checkbox"/> Golf Home-Home             | <input type="checkbox"/> <b>Tennis</b>        |
| <input type="checkbox"/> Barbershop 4tet          | <input type="checkbox"/> Cooking (Host)              | <input type="checkbox"/> Guys Dine Out              | <input type="checkbox"/> <b>Theatre</b>       |
| <input type="checkbox"/> <b>Baseball Day</b>      | <input type="checkbox"/> <b>Crab Feed</b>            | <input type="checkbox"/> Harmonica                  | <input type="checkbox"/> <b>Travel</b>        |
| <input type="checkbox"/> <b>Biking</b>            | <input type="checkbox"/> Cribbage                    | <input type="checkbox"/> <b>Hikers</b>              | <input type="checkbox"/> <b>Walkers</b>       |
| <input type="checkbox"/> Book Club                | <input type="checkbox"/> <b>Dancing</b>              | <input type="checkbox"/> <b>Historical Interest</b> | <input type="checkbox"/> <b>Wine Finders</b>  |
| <input type="checkbox"/> Book Swap                | <input type="checkbox"/> <b>Digital Photo</b>        | <input type="checkbox"/> Hobby Display              | <input type="checkbox"/> <b>Wine Tasting</b>  |
| <input type="checkbox"/> <b>Bocce</b>             | <input type="checkbox"/> <b>Dinner Dances</b>        | <input type="checkbox"/> Horseshoes                 | <input type="checkbox"/> <b>Wine Bargains</b> |
| <input type="checkbox"/> <b>Bowling</b>           | <input type="checkbox"/> <b>Dine In (Potluck)</b>    | <input type="checkbox"/> Investments                | <input type="checkbox"/> Woodworking          |
| <input type="checkbox"/> Bowling, Lawn            | <input type="checkbox"/> <b>Dine Out (Group)</b>     | <input type="checkbox"/> <b>Internet Games</b>      | <input type="checkbox"/> Write Autobio        |
| <input type="checkbox"/> Breakfast Club           | <input type="checkbox"/> Dominoes                    | <input type="checkbox"/> <b>Jazz Sacramento</b>     | <input type="checkbox"/> Veterans             |
| <input type="checkbox"/> Brewing                  | <input type="checkbox"/> Economic Study              | <input type="checkbox"/> Model Railroad             | <input type="checkbox"/> Yoga                 |
| <input type="checkbox"/> <b>Bridge, Basic</b>     | <input type="checkbox"/> <b>Explore &amp; Eat</b>    | <input type="checkbox"/> <b>Pickle Ball</b>         |   |
| <input type="checkbox"/> <b>Bridge, Duplicate</b> | <input type="checkbox"/> Fishing                     | <input type="checkbox"/> Pinochle                   |   |
| <input type="checkbox"/> <b>Bridge, Rubber</b>    | <input type="checkbox"/> <b>Football Day</b>         | <input type="checkbox"/> Poker                      |   |
| <input type="checkbox"/> <b>Bridge, Travel</b>    | <input type="checkbox"/> <b>Games Night</b>          | <input type="checkbox"/> <b>Pool-Billiards</b>      |   |
| <input type="checkbox"/> Chess                    | <input type="checkbox"/> Gardening                   | <input type="checkbox"/> <b>Racing Day</b>          |   |
| <input type="checkbox"/> Chorus                   | <input type="checkbox"/> Genealogy                   | <input type="checkbox"/> Radio Amateurs             |   |
| <input type="checkbox"/> Coins                    | <input type="checkbox"/> Gin Rummy                   | <input type="checkbox"/> Rec. Vehicles              |   |

Other areas of interest not listed above: \_\_\_\_\_

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**Office or Committee Interests:** Please check those that interest you.

- |                                     |                                      |  |  |
|-------------------------------------|--------------------------------------|--|--|
| <input type="checkbox"/> Big Sir    | <input type="checkbox"/> Little Sir  | <input type="checkbox"/> Secretary           | <input type="checkbox"/> Treasurer           |
| <input type="checkbox"/> Director   | <input type="checkbox"/> Chaplain    | <input type="checkbox"/> Assistant Secretary | <input type="checkbox"/> Assistant Treasurer |
| <input type="checkbox"/> Attendance | <input type="checkbox"/> Membership  | <input type="checkbox"/> Sunshine            | <input type="checkbox"/> Social              |
| <input type="checkbox"/> Golf       | <input type="checkbox"/> Bowling     | <input type="checkbox"/> Computer            | <input type="checkbox"/> Greeter             |
| <input type="checkbox"/> Publicity  | <input type="checkbox"/> Recruitment | <input type="checkbox"/> Activities          | <input type="checkbox"/> Member Relations    |
| <input type="checkbox"/> Newsletter | <input type="checkbox"/> Luncheon    | <input type="checkbox"/>                     | <input type="checkbox"/>                     |

I am willing to volunteer my experience to help SIR (Writing, Accounting, Teaching, Spreadsheets, Training, Publicity, IT, Database, Recruitment, Piano, Singing Leader, Website, Speakers etc.)

My Experience includes: \_\_\_\_\_

\_\_\_\_\_

## Handout MC 5



### SONS IN RETIREMENT

A Non-Profit Public Benefit Corporation For Retired Men Devoted to the Promotion of  
Independence and Dignity of Retirement

Your Branch 000

John Doe  
1000 Tartarian way San Jose, CA  
95129

Dear John,

**CONGRATULATIONS!** The executive committee has approved your application for membership and we are looking forward to you joining us. Your induction ceremony will take place at the next regular meeting on March 20th, where you will receive your official "Rooster" pin, the symbol of SIR.

There will be a brief orientation meeting for all new members and their sponsors at 10:45 AM just before the 11:00 AM social hour. The purpose of this meeting (hosted by a Branch Past-Big Sir) is to familiarize you with the workings of the SIR organization and a little bit about the history of SIR and how it all got started. You will be getting all this information in your new member's folder, but this meeting will allow you to hear it first hand and also give you the chance to ask any questions you may have.

The new member's orientation meeting and induction will take place at the Lodge where you should meet the Past Big Sir at the "new members table" located in front of the stage. From there you will go to one of the smaller rooms for the meeting, which will last 15 to 20 minutes.

Based upon my own experience and that of many of our active members, you will enjoy the SONS IN RETIREMENT most fully by participating in the various activities and possibly volunteering to serve either as an officer or on committees. It is these involvements that help you meet new friends and fully enjoy the fellowship and benefits of SIR.

Best Regards

Dick Jones  
Director of Membership, Branch 000  
(000) 000-0000

## Handout MC 6



### SONS IN RETIREMENT

A Non-Profit Public Benefit Corporation For Retired Men Devoted to the  
Promotion of Independence and Dignity of Retirement

Your branch XX

## Orientation Outline

1. Welcome the new members.
2. Thank the sponsors — keeps membership more vital and enthusiastic.
3. Brief history of SIR (Info sheet in envelope for reading later)
  - a. Damian Reynolds — Retired engineer from San Mateo had idea resulting in SIR formation.
  - b. Met for lunch with three of his friends in July 1958.
  - c. Felt other retirees might enjoy such luncheons and decided to invite friends to an August luncheon. 18 men met and established a few simple rules and chose the name "Sons In Retirement".
4. The name seemed to enunciate and give dignity to retirement.  
The entire SIR Organization is run on the spirit of Volunteerism. It is this spirit that keeps Sons In Retirement a viable and fun filled group.
5. Organization and Objectives
  - a. A non-profit public benefit corporation that is not organized for private gain of any person. It is intended to provide for social welfare for retired men from all walks of life.
  - b. It aids the enjoyment of our retired years with dignity and pride.
  - c. In some cases we are able to renew friendships and in others to meet new friends.
6. A small annual donation of \$25 is requested as a contribution toward offsetting our expenses. Recent changes in our State rules does now allow a Branch to have dues if approved by the BEC.
7. The greatest benefit to you is to join an activity and become involved.
8. Our Symbol is the Rooster  
Of all creatures on earth it is felt he expresses more independence and dignity than any creature on earth. The majesty of his presence is felt in barnyard and his crow can be heard for miles.
9. You will be inducted and receive your Rooster pin at the luncheon.
10. GEOGRAPHICALLY – Red Bluff/Redding to Bakersfield.

11. MEMBERSHIP - Approximately 15000 in 120 Branches.
12. All State and Branch Officers are elected volunteers.
13. State organization has a President, V P, Secretary, Treasurer and 10 Regional Directors. There are 24 Area Governors that are responsible for 3 to 8 Branches. Volunteers staff all offices.
14. Our Branch has a Big Sir, (Chief Ex. Officer) Little Sir, Secretary, Asst. Sec. Treasurer, Asst. Treasurer and 3 Directors along with numerous Committee Chairman.
15. Each Branch is issued a number. We are Branch # 000
16. KINDLY OPEN YOUR ENVELOPE.
  - a. Badge with membership number and colored sticker.
  - b. Membership Roster. Names and addresses of all members and Committee members as of January 2002. Update information is included in your envelope.
  - c. The membership. Roster is not for commercial use.
  - d. ATTENDANCE - By rule, Members are required to attend a . minimum of 6 regular luncheons within the 12 consecutive months. Also, if a member misses 3 consecutive meetings and does not inform the Attendance Chairmen, it may be determined he lacks interest. He shall be contacted in person or by mail regarding his lack of attendance. You can make up meetings by attending another branch.
  - e. BULLETIN. You will receive a monthly copy of the Branch bulletin to keep you current on such items as Branch and SIR activities, monthly luncheon speakers, and comments from your Branch officers.
17. The activities are for active members and their guests. The travel program may also include guests and your spouse. There are also a couple of parties each year where spouses are included.
18. The spirit of VOLUNTEERISM keeps SIR a viable and filled group. we are all volunteers and you can start that involvement by inviting one or two of your friends to the next luncheon. An application form is included in your envelope to aid you in bringing in new members.
19. A special table is reserved for you and your Sponsor in front of the head table today. You will be introduced and will receive your golden Rooster pin as a new member.
20. Your Sponsor will show you around and help you meet the men heading the activities in which you have an interest.
21. Before we adjourn are there any questions?

22. If at a later date you have any questions please feel free to ask any member of your Executive Committee for clarification. Either in person, by phone, or come to one of our monthly Executive meetings. You are more than welcome.



INCORPORATED

23. **Handout MC 7**

*Devoted to the Promotion of Independence and Dignity of Retirement*

Date: \_\_\_\_\_

Dear Sir \_\_\_\_\_

Sons In Retirement cordially welcomes you to membership in Branch No. \_\_\_\_\_. Your sponsor had the distinguished privilege of inviting you to membership in the Branch and the Branch Executive Committee had the honor of confirming his choice. As a member, you may also sponsor a friend's application and we hope you do.

The purpose of Sons In Retirement, Inc. is to promote the happiness of retired men by assisting them to renew old friendships and associations and to provide the opportunity for new friendships through association with other retired men.

Each member is assigned an identification number that appears on his lapel badge. Your badge is filed in numerical order near the entrance to the luncheon meeting place, and will be given to you when you enter. You should wear it during the meeting and be sure to return it when you leave. Attendance is checked by noting the badges remaining in the file at the end of the meeting.

We look forward to your regular attendance. In order to retain one's membership, we must not miss three consecutive regular luncheon meetings without having been excused by contacting the designated Branch Attendance person prior to the meetings, and we need to attend at least half of the regular luncheon meetings during the previous twelve consecutive month period. Note that excused meetings cannot be included to achieve the minimum attendance.

Membership in more than one Branch is not permitted. If you should move and wish to join another Branch, our Membership Chairman will help to facilitate your transfer.

You will enjoy "The SIRs" most best by participating in the activities and by volunteering to serve as an Officer and on committees. You are always welcome to attend the Executive Committee meetings that normally precede the general luncheon meetings.

Congratulations! You are now a member of Branch No. \_\_\_\_\_ and your Badge No. is \_\_\_\_\_

\_\_\_\_\_  
Membership Chairman

\_\_\_\_\_  
Phone Number





## **Handout MC 9**

### FORM 27A INSTRUCTIONS for Form 27 (2016) MONTHLY BRANCH MEMBERSHIP REPORT

#### General

Form 27 (newly simplified for 2016) is designed to provide a standard form that facilitates review of membership and luncheon attendance statistics. The information to be entered monthly is obtained from the Branch Membership and Attendance Chairmen.

Two short videos introduce the new, simplified Form 27 on You Tube:

Part 1 explains the structure and rationale behind the new form (6 minutes) Available from <https://www.youtube.com/watch?v=NWiCl1RjxnE>

Part 2 demonstrates how to add data to the form (9.5 minutes) Available from <https://www.youtube.com/watch?v=AN7U8VSyTpQ>

These videos are best viewed at 720p, full screen; click on the gear wheel icon (bottom right) to select this setting.

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](http://sirinc.org) web site. 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.

#### How to Download Form 27 from the [sirinc.org](http://sirinc.org) Website

Navigate to the Forms section of the [sirinc.org](http://sirinc.org) website and select Form 27, download and save it. Save a working copy with a different name so you have a good version to refer to if things go wrong!

#### Open Form 27 in Excel (or equivalent program)

Navigate to the folder containing your working copy of the Form 27 file and double click it This will open Form 27 in Excel. The Form 27 spreadsheet will appear as a fillable, preprogrammed Excel file.

If you save the file with the SIR standard naming convention, the file would be named like "form27brnnn\_yyyymm.xls", where "nnn" is your Branch Number (e.g. 999), "yyyy" is for year (e.g. 2016) and "mm" is month (e.g. 01 for January), resulting in a filename like "form27br999 201601.xls" save this to a folder such as "sirform27".

There are several free Office suites which offer the same capabilities as MS Office. The one which seems most compatible with Excel is WPS Office from Kingsoft, two others are Libre Office and Apache Open Office. There is also a free Online Excel from Microsoft which only requires a Microsoft account (free) which works with OneDrive, their cloud account and is a little more complicated to work with. The free products can each Save files As Excel format, and the .XLSX is the best choice for compatible purposes.

## Input Initial Data (Steps 1-3)

First watch the Form 27 videos, parts 1 and 2.

An annotated copy of Form 27 is added as page 4 of this message, the annotations refer to the steps in the following instructions.

**NOTE:** You will need copies of the last three (3) year's Form 27 to fully complete Step 2

Step 1. Input Year, Region, Area and Branch information. (See annotated form, #1)

Step 2, By entering 2016 in the Year box the 3 Previous Years cells will be 2013, 2014 and 2015 and these are entered automatically for you.

In the 'Previous Years' columns in Row 1 enter the number of Active members at the end of the previous year. Under 2013 you would enter the membership as of December 2012 (line 15 on old Form 27), the number of members IN for 2013 (line 1 1 Total on old Form 27) and the number of Active members OUT for 2013 (line 14 Total on old Form 27). The number of Active members at the end of 2013, Line 4, is therefore Lines (1+2-3), this number should be the same as Line 15, Dec on old Form 27.. Repeat this process for each of the other 2 years. If some data is unavailable you must at least enter the 2015 data. Save the file regularly to prevent data loss if your computer develops a problem!

Note: Inactive members are NOT recorded at all on the new Form 27.

Step 3. In the "Branch Goal" column input your Branch objectives unless you accept the minimum goal default values (in the "Min Goal" column) calculated from your 2015 data. These minimum numbers are meant as a guide especially for the number of guests you need to bring in the necessary number of new members to meet the "PLUS 1" goal.

### Monthly Data Input

The monthly input data for Form 27 are to be determined as of the date of the monthly Branch Executive Committee and Luncheon meetings after all inductions and resignations have been reported. New applications and resignations that occur after the monthly Branch Executive Committee meeting shall be reported on Form 27 for the next month.

Step 4. To add data for the current month open the most recent file "form27" from the folder on the hard drive. If you are following the recommended file naming conventions, the file would be named like "form27br999 201601.xls" .

Step 5 To select the month, click on the Month box, then click on the small arrow that appears on the right side. A drop-down menu allows you to choose the month to input data.

For the month of January, input data in the January Column unshaded boxes for lines 2, 3, 8, and 10. Save as "form27br999 201601 -xls" Save this file in the "sirform27" folder

Step 6. Prepare an e-mail distribution list. In the Address book input e-mail addresses for sirstateform27@gmail.com, each BEC member, Area Governor, Regional Director and RAMP Chairmen. Form a new "group" that includes these e-mail addresses, as this will save you time instead of manually adding individual email addresses each month.

Step 7. Prepare an e-mail addressed to the "group", attach this month's file eg: "form27br999 201601 -xls" and send.

Step 8. In successive months repeat Steps 4, 5 and 7, changing the saved file name appropriately.

## Definitions:

### Membership Data

**Active Members:** Those on the current Active Member Roster, including HLMs and Emeritus members.

### Luncheon Attendance Data:

**Active Members:** The number of active members, including HLMs, in attendance.

**Guests:** The number of those introduced as potential members (ie speakers and other visitors are not included).

### Who completes and submits Form 27?

The Membership Chairman arranges for the production and distribution of the Form 27. Not all branches have added this person's name to the Branch Roster via Form 20 so it isn't always clear who actually completes and distributes Form 27. The new 2016 Big and Little Sirs are therefore asked to ensure that the responsible members in their branch receive this message.

### Questions Contact

If you have questions regarding the use of this form contact your Area Governor or Regional Director. Some Areas and Regions are setting up a 'buddy' system where an experienced member at one branch helps a member new to Form 27 at another branch.

**FORM 27 - MONTHLY BRANCH MEMBERSHIP REPORT**

Blue cells are calculated fields: passworded and locked.

Year:  Report Month:  Region:  Area:  Branch:

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)													0	
2	NUMBER OF MEMBERS IN													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	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year Total	Year %	Min Goal	Branch Goal
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? **0**

**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**

Form 27 for the month should be distributed to the list above by the 10th of the following month (R.U.E 167)

Submitted By:

Title:

Meeting Date:

Phone #:

## Handout MC 10

### Analyzing Form 27

*Note the previous year's columns. These must be completed to provide you 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.

**Now you are ready to begin your monthly analysis.**

*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.**

*Now, review Lines 5 and 6. They relate to branch total and couples activities*

- > How do they compare to previous years?
- > 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 a sign 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.**

# Handout MC 11

## SIRINC.ORG Website

# SONS IN RETIREMENT

"MEN ENJOYING ACTIVE RETIREMENT"



WWW.SIRINC.ORG

[SIR Mission](#)

[HOW TO JOIN SIR](#)

[Branch Locations](#)

[Branch Websites](#)

[Member's Information](#)

[What is SIR?](#)

[How SIR Started](#)

[About the Roster](#)

[SIR HAPPENINGS](#)



LIKE US ON  WATCH OUR VIDEO 

Are you retired or semi-retired and want to make new friends, participate in fun activities and better enjoy your leisure time?

**JOIN SIR and MAKE FRIENDS FOR LIFE!**

SIR Membership is open to men regardless of age, race, national origin or religion. Begun in 1958, SIR has thousands of members and branches in most areas of **Central and Northern California**. Surely there is a Branch near you. See the "**Branch Locations**" button on the left for specific localities.

**WE CREATE ACTIVITIES OUR MEMBERS ENJOY.**

We have monthly luncheons with interesting speakers and good fellowship. Additionally, our members have lots of fun doing a variety of other activities such as golf, fishing, bowling, card games and computers. Many activities like travel, dining, picnics, and holiday parties include our ladies and guests. To get more information on our activities **Click on the icons to the right.**

**BUT THERE ARE SOME THINGS WE DON'T DO!**

We don't raise money. We don't have a political agenda. We don't have a religious orientation. We don't sell light bulbs or anything else. We don't have a problem with organizations that do these things, its just that we don't. You've paid your dues to the working world - it's time to enjoy life.

[Email Questions or Comment](#)  
[Click Here](#)

**Popular Activities**

    
Golf Bocce Fishing

    
Cards Travel Dining

    
Computers Bowling Walking

    
Investing RVing Ham Radio

    
Tennis Parties Sports Events

[And Lots More](#)



## MEMBER'S INFORMATION



### STATE INFORMATION

A Few Good Men Needed

[Leaders Needed](#)

[SIR Position Descriptions](#)

Key Documents

[SIR FORMS](#)  
[SIR Leaders Guide 2017](#)  
[Slate Roster and Branch Locator](#)  
\*password needed - Contact Branch Web SIR for password  
[Schedule Of State Operations](#)  
[SIR Rules Manual, Checklist and Revisions](#)

SIR State Communications

[Presidents Video Comments 1](#)

[SIR Happenings Newsletter](#)  
[State Treasurer Reports](#)  
[State Annual and Board Meetings](#)  
[State Executive Committee Actions](#)  
[Presidents Letters](#)

### Region & Area INFORMATION

SIR RD/AG Leadership Training

[RD/AG Guides, Duties & Tools](#)  
[AG & RAMP Trainers Training Dates](#)  
[RD/AG Leadership Training Docs](#)

Area Improvement

[Ideas, Tools & Examples](#)

### BRANCH INFORMATION

Membership Information

[Membership Statistics](#) NEW Monthly  
[Branch Data Sheets](#)  
\*password needed - Contact Branch Web SIR for password  
[SAT Branch Membership Charts](#)  
[Branch Membership Counts 2011-June 2016](#)

SIR Branch Officer Guides

[Br. Leaders Guides, Duties & Tools](#)  
[Schedule Of Branch Operations](#)

Branch Improvement

[Ideas, Tools & Examples](#)  
[PROJECT 2016](#)  
[G & M Newsletters](#)

Branch Officer Training Information

[RAMP Toolkit 2017 Document](#)  
[Branch Leaders Training 2016](#)

Travel Management Information

[Qualified Travel Agencies](#)  
[Qualified Bus Companies](#)  
[Travel Handbook](#)

How To Information

[Branch Banking](#)  
[Merge Branches](#)  
[Obtain a Nonprofit Mail Permit](#)  
[Get Official SIR Logos](#)  
[Get Letterhead Stationery](#)  
[Raffles](#)

### MISC. INFORMATION

SIR Promotional Items

[SIR Apparel](#)  
[SIR Banners](#)

Organization Information

[SIR Organization Chart](#)  
[SIR Hierarchy Level Table](#)  
[Non-profit Documents](#)  
[IRS Group Exemption Number](#)  
[Worthy Causes](#)  
[Primer - Use of SIR](#)  
[Charter Day Presentation](#)  
[SIR: A Club For Men](#)  
[SIR History](#)

Computer User Information

[Publish Your Own Branch Website](#)  
[Branch Website Model](#)  
[SIR Database](#)  
\*password needed for State Administrator User Only

Archived Member Information

[Archived Member Information](#)

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search engines by: [blekko](#) [ecrunch](#)

## Handout MC 12

### **Learning Points for Membership Chair Training**

Memorize the SIR Mission Statement  
Understand your job and that of the Big Sir  
Characteristics of successful SIR branches  
Processing a new member into the branch  
Maintaining Membership database  
Prepare Form 27  
Analyzing Form 27  
The usefulness of the [sirinc.org](http://sirinc.org) website