

# Branch Health Assessment Form

## Ideas For Improvement

### Assessment Category 1: Annual Membership Trend

A Branch cannot survive as a organization if it continues to lose (net) membership. If the Branch is losing membership, year to year, and not keeping up with its membership losses, an analysis should be undertaken to determine what is happening. Actions in this section deal with preventing the erosion of membership by determining the number lost and the reason for it. We must obtain member feedback and develop action plans to prevent net membership loss.

- If new members don't feel connected: work with the members and their sponsors.
- Pass new members name off to the Member Activities Chairman or to chairmen of activities that match his areas of interest.
- Encourage him to provide his assistance in starting a new activity.
- Involve him in one of the Branch Membership Growth committees.
- Indicate on membership badges that the member is new.
- Make it a point to introduce new members to other new members and other members of the Branch.
- Have Branch Executive Committee members search out new members and see how they are doing.
- Set up a luncheon table with new members and enthusiastic old members to get that enthusiasm rubbed off.
- Introduce him to members with similar or tangential careers.
- Interview members not attending meetings or activities. Find out the reasons. Look past "too busy" as an acceptable response. Delve deeper for the real reasons and take action to see they are remedied.
- Have a Branch Executive Committee member and/or his sponsor meet with him.

### Potential Goals

- Limit preventable membership loss to no more than three members.
- Grow active membership by 3%.

### Actions To Prevent Losing Membership

- ❖ Start the New Member Recruitment, Member Relations and Member Activity Committees.
- ❖ Conduct short, confidential "exit interviews" with terminating members. Determine the "real" reason they are leaving.
- ❖ Contact members who show a pattern of absence from meetings or non-participation. Determine what is causing the behavior.
- ❖ Survey a sample of current members to see what they really think of the branch.  
Three questions to be asked:
  1. What do you like about the branch?
  2. What do you feel could be improved in the branch?
  3. If you could see one improvement made, what would it be?
- ❖ Interview members at their six month anniversary.
- ❖ Get feedback on identified problem areas.
- ❖ Monitor goal achievement quarterly, and revise action plans as necessary.

### **Actions To Focus Branch Membership On Recruiting New Members**

- ❖ Have an External Recruitment member as part of the New Member Recruitment Committee to reach golf courses, bowling alleys, health clubs, etc. with SIR Brochures and Flyers.
- ❖ Incentivize current members to bring in guests and convert them to members by recognizing Sponsors and Hosts - Example: a free lunch ticket for each new member recruited or hosted.,
- ❖ Incentivize new members to bring in one new member within two years by signing the "Legacy of One" commitment form and then report each month in Newsletter as the member implements his pledge.
- ❖ Contact major employers to meet and address groups of pre-retirees about SIR membership.
- ❖ Build a professional branch website linked with the State website .
- ❖ Attend local health fairs , represent SIR and the advantages of membership.
- ❖ Man a booth at local "festivals" to introduce SIR to the 60 + public and raise the profile of SIR.
- ❖ Conduct a New Member Contest with recognition of the leading Teams

### **Assessment Category 2: Median Age Of Branch Membership**

Much analysis has been done regarding the link between the median age of the Branch membership and the ability of the Branch to remain viable. As the members age, the Branches begin losing their former energy, activities and vitality. If these attributes diminish over time, the change directly affects many other reasons why the Branches become less attractive to both potential and existing members. At the point a Branch membership median age is 70 or above, it has been our experience that the Branch is headed for failure unless dramatic actions are taken.

The recently completed document "SIR Branch Recruitment and Retention Tools, Part 1, Step III", deals with Member Relations (Document 4 on State Website). It recommends that new member relations be institutionalized with a standing committee. It supplies many worthwhile additional tools to ensure that the new member experience is one that builds a lasting membership. It can significantly help improve Branch median age.

New retirees and especially those under age 70 are the lifeblood of a Branch. As the percentage of Branch membership under age 70 decreases, the following negative results come into play:

- Branch median age increases more quickly.
- Branch vitality is reduced.
- It becomes more difficult to attract younger retirees into the Branch.

#### **Potential Goals**

- **Twenty-five percent of our Branch new members will be age 69 or lower.**
- **Convert eighty percent of our guests under age 70 to members.**
- **Purge our membership roll of those who have become inactive.**

### **Actions To Decrease Our Branch Median Age**

- ❖ Recruit "younger" retirees and introduce them to the advantages of our branch
- ❖ Institute a Member Relations Committee to improve overall member satisfaction and retention.
- ❖ Keep younger members active and involved; monitor & track what & how they are doing.
- ❖ Survey each member under age 74, ask what will make their membership more meaningful? Implement as much as possible of their recommendations.
- ❖ Implement the recommendations found in Part 1, Step 3 of the Recruitment and Retention Tools.

### **Assessment Category 3: Number of Branch Specific Activities**

A measure of Branch vitality is the number of activities available to members. Our more successful Branches have 10 or more with some over 20. Activities are the glue which makes the Branch stick together. Interesting speakers and **activities that involve couples** are critical! The more activities in a Branch, the more attractive it is to those we are trying to recruit. If the Branch has only two or three activities, it dramatically limits its pool of potential members. How, then, have these successful Branches developed so many activities?

- First of all, it's helpful to survey Branch members regarding skills and hobbies they have that they would be willing to share with other members. Concurrent with that, it's useful to know what activities members might be interested in.
- Our SIR Branches have over 75 different activities. A list of these activities can be found at [www.sirinc.org](http://www.sirinc.org) > **SIR Documents > Membership and Recruiting > Public Relations > Area Activities List**. Certainly, this list provides food for thought. All that's needed, next, is a member to champion the formation and enough interested members to participate - or at least give it a chance.
- Part 1, Step II of the SIR Branch Recruitment and Retention Tools document has useful suggestions regarding the building of a robust activity program.

#### **Potential goals**

- **Institute a Branch Member Activities Chairman to increase the range of member activities.**
- **Survey your members for interests and begin four new activities this year.**
- **Initiate at least 2 (more is better) new Branch activities for couples.**
- **Ask for assistance from other Branches to help us start new activities**

### **Actions To Improve The Number Of Activities**

- ❖ Establish A Member Activities Chairman in the Branch to encourage maximum participation of the membership.
- ❖ Assist the chairman of the new activity in getting it organized and underway.
- ❖ Publicize current and new activities among the members in Newsletter, each month.
- ❖ Fill vacant Activity Chairman posts and manage scheduling of activity conflicts with each other.
- ❖ Survey members for skills and hobbies they are willing to share with other members.
- ❖ Review Area Activities on SIR website to for new ideas for your Branch.
- ❖ Contact individual Activity Chairmen in other Branches for assistance in getting started.
- ❖ Establish an annual recognition breakfast for activity chairmen.

### **Assessment Category 4: Average Percent Attending Regular Lunch Meetings**

It is recognized that our most vital Branches have annualized luncheon attendance of over 70% of the membership. Erosion of meeting attendance is a harbinger of other significant Branch problems.

#### **Potential Goals**

- **Increase meeting attendance to 70% minimum.**
- **Present three speakers on topics deemed high interest by our members based on a member survey.**
- **Improve quality of food.**

### **Actions For Improving Luncheon Meeting Attendance**

- ❖ Survey the membership for topics of interest and seek appropriate speakers to the topic.
- ❖ Keep the meeting to a two hour maximum.
- ❖ Determine if meeting cost to the members is keeping them away, and seek ways to remedy the situation.
- ❖ Encourage members who live near each other to travel to the meeting together as they are more likely to attend.
- ❖ Periodically have a special award given at an unannounced meeting and made available only to members in attendance - perhaps a \$50 drawing.
- ❖ Do what you can to break up cliques, and encourage members to mingle with each other.

## Assessment Category 5: Filling Branch Leadership And Committee Positions

Reasons for difficulty in filling leadership and committee positions.

- Few younger candidates with the ability and energy to take on the challenge
- Few remembering and understanding that SIR is an all-volunteer organization.
- Perception (or reality) that the role is too time consuming, too unimportant, too political, etc.
- Leadership succession planning should not be an annual event.
- Candidates should be identified early and given leadership opportunities to gain experience.
- A significant source of officers should be the Branch Executive Committee itself as the majority of the Committee members have a desire to lead.

### Potential Goals

- Become very familiar with, *and use*, the “4 Steps To Get SIR Leadership”.
- Build a Branch culture of participating in leadership and committee chairman positions.
- Examine officer positions to ensure they are not unduly time consuming, and time is spent on the important items.

### Actions For Improving Recruitment Of Branch Leadership And Committee Chairmen

- ❖ Have more than one person on the Nominating Committee and train them in the use of the 4 Steps To Get SIR Leadership.
- ❖ Build an officer succession plan
- ❖ Survey all Branch leadership; determine their interest in serving as Branch Executive Committee members and key committee chairmen.
- ❖ Establish assistant chairman positions to introduce members to Branch leadership.
- ❖ Ask newer members to work as members of the Member Relations, New Member Recruitment and Member Activity Committees.
- ❖ Survey members with one and two year's longevity for a role in the future.
- ❖ Stress participating in Branch leadership at luncheons, in your bulletin and at new member orientation.
- ❖ Periodically recognize specific volunteers for their service to the branch.