Participant Handouts for Building our Branches

March 21, 2019

SIR Branch Self-Assessment

Branch:_____**Location:** _____

What is your Branch's Risk Level?

Assess your Branch at any time, and always in December for the new BEC.

Risk Level	Branch Health
A Low Risk	An area of strength the Branch can build on
B Moderate Risk	Potential problem area to keep an eye on for a potential unfavorable trend. Watch closely to make sure performance doesn't slip
C High Risk	An area that needs to be examined closely and an improvement goal set

Category	High Risk Level C		Moderate Risk Level B		Low Risk Level A	
	Result	Score	Result	Score	Result	Score
1. Annual membership trend	Membership decline or no gain		Net gain between 0.1% and 2.99%		Net gain 3.0% or more	
2. Median age of branch members?	78 years and above		Between 76 and 78		Under 76	
3. Number of branch & area activities? Couples	4 or less		Between 5 and 9; 2-4 couples		10 or more; 5+ couples	
4. Average annualized percent of members attending regular luncheon meetings	Less than 60%		Between 60% and 70%		Over 70%	
5. Does branch have difficulty filling officer, BEC and activity positions?	Yes to any		Sometimes to any.		No to all. Nominating Com focus on succession, and Three Step process to convince volunteers	m
6. How does branch recruit new members, and recognize members for bringing guests?	Relies solely on current member referrals		Reward members for recruiting, use branch brochures, Sir cards, etc.		Uses methods beyond member referrals/reward; Has an active Recruitment Committee, website, unique programs	
7. How does branch involve new members (NM)?	Wait for them to take first step		Orient NM and learn their interests. Suggest activities to join		Encourage NM to share an activity responsibility. Ask him to choose a RAMP Committee for a year.	

Branch Risk Levels: Mostly A's are Low Risk; Mostly B's are Moderate Risk; mostly C's are High Risk

After checking the boxes, discuss your results with your Branch Sirs. C's are high risk and a priority for new goals and action plans. B's are moderate risk and need effort to change to an A. While A's are low risk, the areas should be monitored for any negative change.

Notes on Branch Self-Assessment Categories

Membership Trend – Obviously, if you lose net membership your branch becomes more at risk than if you had gained net membership

Median Age of Members – A branch is more at risk as its median age becomes older. Signs are fewer volunteers, difficulty attracting younger members, higher turnover, lost vitality, etc.

Number of Branch Specific Activities – Branches with more activities are more attractive to members and guests – especially if a number of those activities involve spouses and partners.

Percent of Members Attending Luncheons – This is a gauge of how members perceive the luncheon experience. If they are not attending, you have a problem on your hands that probably involves fellowship, venue, food and drink quality/value and speaker quality.

Ability of the Branch to Fill Positions – If the branch has trouble getting volunteers important roles will not be filled, or if filled, it may not be with the right person. We have lost branches because no one stepped up to become the Big Sir. The Nominating Committee must become a succession planning committee and plan at least two years out.

Recruiting Techniques – Most membership comes from members bringing guests. They **must** be recognized and incentivized. Other sources of first time guests are important, and will typically bring in ten to twenty percent of your new members, but at least as important, they get the word about SIR out to the community and generate name recognition.

Involvement of New Members – A typical branch replaces around 11 percent of its members a year. Thus, about a third of the typical branch has members with three or fewer years membership. It is critical that we involve these members from day one if we are to keep them, turn them into our best recruiters provide them with the full Sir experience and Make Friends for Life.

SIR ACTION PLANNING TOOLKIT

Branch Recruiting

Goal and Action Worksheet

Listed below are some potential goals and actions to get you thinking about how to improve your branch's recruiting performance. Reflect back on the video and the learning points, and check those that will particularly focus branch recruiting efforts.

Potential Recruiting Goals

- Grow active membership by at least one member more than last year's December count
- Develop and implement at least three additional methods to obtain guests than the usual asking members to bring guests
- Turn all branch members into recruiters
- Build an effective Recruiting Committee
- Develop and maintain a great branch website

Potential Actions to Meet Recruiting Goals

- Appoint a Recruiting Chairman
- Appoint a Recruiting Committee
- Communicate the seriousness of the recruiting problem to the members
- Study what works
- Order and distribute Sir Cards
- Place brochures where candidates gather
- Incentivize members to bring guests
- Recognize new sponsors
- Encourage new members to bring guests at orientation
- Implement the "Legacy of One" program
- Tell the Sir story to groups of retirees and pre-retirees
- Represent Sir at local health fairs, golf exhibitions, etc.
- Man a booth at local "festivals"
- Conduct a new member "contest"
- Encourage member spouses/partners to promote Sir to their friends
- Continuously communicate recruiting and guest needs at the
- BEC, luncheons, monthly bulletins, ladies' days, etc.
- Ensure members have a ready supply of branch promotional materials
- Ensure guests are made to feel welcome and appreciated

Branch Activities

Goal and Action Worksheet

Listed below are some potential goals and actions to get you thinking about how to improve your branch's activity performance. Reflect back on the video and the learning points, and check those that will particularly focus branch recruiting efforts.

Potential Activities Goals

- Institute a Branch Activities Coordinator and Committee to increase the range of member activities and encourage maximum participation of the members.
- Begin four new activities this year.
- Initiate at least 2 (more is better) new Branch activities for couples.
- Implement a program to introduce guests to the branch through the activities

Potential Actions to Meet Activities Goals

- Review the list of the 75 activities in Sir as found on the sirinc.org website to generate activity ideas
- Publicize current and new activities among the members at the luncheon and in the 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
- Contact individual Activity Chairmen in other Branches for assistance in getting an activity started
- Establish an annual recognition breakfast for activity chairmen
- Review the State Sir Happenings newsletter and other branch newsletters for activity ideas
- Encourage small activity groups to band together as an Area activity
- Follow up on new member interests as an opportunity to create a new activity
- Ensure each activity has an assistant chairman to preserve activity continuity

Branch Member Relations

Goals and Action Worksheet

Listed below are some potential goals and actions to get you thinking about how to improve your branch's Member Relations performance. Reflect back on the video and the learning points, and check those that will particularly focus branch Member Relations efforts.

Potential Member Relations Goals

- Increase the 2016 guest-to-new member performance rate (new members divided
- by guests) by ten percent vs. 2015.
- Reduce turnover due to preventable causes by forty percent
- Implement a plan to continually improve the value of the luncheon meeting
- program for members and guests.
- Build an effective Member Relations Committee

Potential Member Relations Actions

- Appoint a Member Relations Chairman
- Appoint a Member Relations Committee
- Develop a comprehensive New Member Orientation Meeting Plan.
- Develop an effective process/plan designed to continually review and revise the value of the luncheon meeting experience for the members and guests- e.g. zero tolerance for table conversation during program and for offensive jokes from the podium, insertion of fun-filled program parts, review/feedback on speakers, elimination of boring parts of program including excessive length of announcements.
- Hold an annual survey of members for feedback and action
- Improve the branch culture through New Member Orientations and other means
- Involve new members early in an activity(ies), committee/team/project(s).
- Encourage volunteering for and/or accepting leadership roles when offered.
- Develop a packet of materials for distribution at New Member Orientations to include the rooster pin, activities list, SIR and Branch History, brochure(s) and flyer(s) about SIR, etc.
- Encourage and incentivize new members to bring guests at orientation.
- Ensure guests are made to feel welcome and appreciated

Branch Publicity and Image

Goal and Action Worksheet

There are two major ways for a branch to obtain members and subsequently, guests. There is the internal recruiting method of members bring guests, and the external recruiting method of guests coming to the branch with no previous member contact. No matter which manner a guests comes to the branch, branch publicity and image is a critical activity.

To say that Sons in Retirement is one of the best kept secrets in Northern California would be an understatement. Anything we can do to inform out target recruits of the benefits of joining Sir will bring the branch recruiting dividends.

Listed below are some potential goals and actions to get you thinking about how to improve your branch's publicity and image efforts. Reflect back on the video and the learning points, and check those that will particularly focus branch efforts in this area..

Potential Publicity and Image Goals

- Improve branch publicity and Image
- Develop or update the branch website and ensure it conveys the branch image you strive for
- Improve the Branch image at luncheons
- Build an effective Publicity and Image Committee

Potential Actions to Meet Publicity and Image Goals

- Appoint a Publicity and Image Committee Chairman

- Appoint an appropriate P&I Committee with the appropriate skills and competencies

- Visit local newspapers and make a personal contact with the person who writes the "This Week in the City" column

- Study what works in other branches

- Write monthly announcement informing the public of the branch meeting, time location, speaker and how to contact the branch

- Write press releases highlighting significant branch accomplishments that would be of interest to the public

- Maintain a stock of Sir brochures, cards and other publicity items

- Develop and implement a plan to sell Sir apparel to members

- Write content to develop or update the branch website

- Review the branch website to insure it is user-friendly to

- potential guests and members
- Support the Recruitment and Member Relations Chairman's efforts
- Place brochures in places visited by candidates
- Determine all the groups serving seniors in the area, and contact them to see if an alliance makes sense
- Improve the Sir image at luncheons though effective use of the Sir Banner, signs, activity posters and activity information
- Develop and/or modify branch recruiting brochures

Goal Setting

Reasons for Setting Goals

- Give clarity to your end vision "If you don't have a goal, all roads lead to New York!"
- Give you focus
- Help you stretch to new heights

Steps to Establish Effective Goals and Action Plans

Step 1. Establish the Vision

- Make goals broad, not just one or two activities
- Write them down
- Make goals specific and measurable
- Start goals with an active verb (Achieve, Implement, Develop, Initiate,
- Communicate, etc.)
- Make goals realistic

Step 2. Action Plan Specific Activities that Ensure Goal Accomplishment

- Develop them mutually with those responsible for achieving them. "We tend to support that which we create."
- Set priorities
- Break goals into specific, time-based actions
- Assign responsibilities
- Establish start and completion dates

Step 3. Execute

- Track monthly progress from start to end
- Communicate monthly progress
- Provide feedback
- ◦ How are we doing?
- ◦ What is helping goal attainment
- ◦ What is hindering goal attainment
- Celebrate goal accomplishment
- Identify reason for non-accomplishment

Step 4. Review and Update

Goal and Activity Planning Worksheet

Completed By: _____**Branch No.** _____ **Date:** _____
Title

Goal	Activities	Start/End	Responsibility
1.			
2.			
3.			
4.			