



Form 20 & Recruiting Leaders

Dennis Pangburn, Region 3 Director





SIR

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View President Stu Williams' [January 9th fireside chat](#) to learn what's happening in SIR.

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During the Coronavirus pandemic, please follow government guidelines and keep in touch via [Zoom](#), telephone, and newsletters. Use directions provided to branches by SIR State regarding planning and startup



Keys to Branch Success

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SIR Expectations of Members

- 1. Be a Friendly Sociable Guy**
- 2. Participate in our Activities, Lunches and Events**
- 3. Volunteer when Asked – Give it a Shot**
- 4. Bring Guests to Perpetuate the Organization**



SIR Expectations of Leaders

- 1. Exhibit Enthusiasm, Open Mindedness, Knowledge**
- 2. Recognize Contributions of Others**
- 3. Be a Skilled Problem Solvers**
- 4. Be a Decision Makers**



APPLICATION FOR SIR MEMBERSHIP (or Transfer)

**SIR's Mission is to improve the lives of our members through
fun activities, luncheons and events while Making Friends for Life**

Please Print the Following Information Clearly

First Name	Initial	Last Name	Nickname	Wife or Partner's First Name

Home Address (Street #, Apt.)	City, State	Zip Code
Mailing Address (If Different)	City, State	Zip Code
Area Code - Phone Number	E- Mail Address	Birth Date

I understand that SIR's Member Expectations are few: Be a sociable guy, participate in our activities, luncheons and events, give a shot at volunteering when asked and at bringing guests to introduce them to the joys of SIR and perpetuate the organization.

A Toolkit for Building our Branches



March 21, 2019



NOMINATING COMMITTEE CHAIRMAN

This leader is responsible to ensure the branch nominates the best candidates for officer and director positions, to influence those candidates to accept nomination and to provide the branch with trained backup candidates for all officer and RAMP chairman positions.



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Branch Contacts and Locations

Branch Websites

Membership Reports ▶

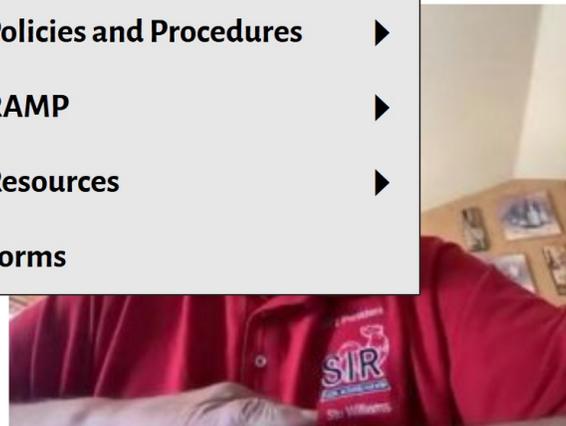
Training ▶

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Branch Websites

Membership Reports ▶

Training ▶

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Forms



Keys to Branch Success

RAMP: Member Relations Video

RAMP: Activities Video

RAMP: Recruiting Leaders Video

RAMP: Recruiting and Retaining Members Video

RAMP Toolkit

[Cash Report Form 28](#)



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RAMP: Recruiting Leaders Video

Recruiting Branch Leadership



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Annual SIR Schedule of BRANCH Operations

Revision 9/11/2020

When	BIG SIR	LITTLE SIR	SECRETARY	TREASURER	OTHER
It is important to start preparing for the following year as soon as the Big Sir and his team are elected.					
Previous September	Big Sir Elect begins selecting Nominating, Audit Committee and all Branch Committee Chairmen including; administrative and RAMP Committees and members				
Previous December	Big Sir Elect confirms Nominating, Audit Committee and all Branch Committee Chairmen including; administrative and RAMP Committees and members prior to January 1st.				
Routine	<p>Hold regular monthly luncheon meetings as established by the Branch BEC. Ladies Day and other events inviting ladies may be held in lieu of regular luncheon meetings each year.</p> <p>Check calendar for future holidays that may necessitate changing regular luncheon meeting day.</p> <p>Big Sir may call special meetings of Officers or members with at least 5 days written notice.</p> <p style="color: red;">Confirm Luncheon Greeters are in place to Greet new members, guests and others</p>	<p>Identify guest Speakers for the new Year. May establish a Committee to assist.</p> <p style="color: red;">Review SIR Schedule of Branch Operations monthly to ensure compliance and report any non compliance to BEC</p>	<p>Send minutes to Area Governor & Regional Director by the end of the month or send memo to them when a BEC meeting is not held.</p> <p style="color: red;">Notify State Roster Chairman of any changes to Form 20 Branch Personnel. ESSENTIAL</p> <p>Send notice of Branch Records transfer to Area Governor by 1/3/</p> <p style="color: red;">Report to BEC monthly on correspondence received and upcoming submittals due</p>	<p style="color: red;">Send Form 28 - Monthly Cash Report to Asst. State Treasurer by the end of each month CRITICAL</p>	<p>Bulletin Editor - Ensure Branch bulletin is sent to all Branch members, Big Sirs of Area Branches, Area Governor & Regional Director.</p> <p>Bulletin Editor - Send articles and photos from the Branch bulletins as separate items or the entire bulletin as a text document to Sir Happenings (JLSABO3 @Comcast.Net).</p> <p style="color: red;">Membership Chrmn ensures that Form 27 - Membership Status is submitted by the end of each month CRITICAL</p>
January	<p>Confirm Nominating and Audit Committee Chairmen appointments have been made.</p> <p>Complete installation of Officers and Directors not previously installed.</p> <p>Communicate Goals and Action Plans for coming year to membership. Include in BEC minutes, Newsletter, and website</p> <p style="color: red;">Secure approval of the year's Branch activities and record in BEC minutes. ESSENTIAL</p>	<p style="color: red;">Verify SIR State assessment was paid by 1/15 CRITICAL</p> <p style="color: red;">Review SIR Schedule of Branch Operations monthly to ensure compliance and report any non compliance to BEC</p>	<p>Send BEC meeting minutes to Area Governor & Regional Director by the end of the month or send memo to them when a BEC meeting is not held.</p> <p style="color: red;">Report to BEC monthly on correspondence received and upcoming submittals due</p>	<p style="color: red;">Pay SIR State assessment by 1/15, basis is October members. CRITICAL</p> <p style="color: red;">Send Form 28 - Monthly Cash Report to Asst. State Treasurer by the end of each month CRITICAL</p>	<p>Branch Officers transfer all records to the incoming Officers by January BEC meeting.</p> <p>Audit Committee Chairman completes Branch Audit of books and records of all financial transactions including Branch activities like Golf, Bowling, etc. by the Branch Audit Committee</p> <p style="color: red;">ESSENTIAL</p> <p style="color: red;">Membership Chrmn ensures that Form 27 - Membership Status is submitted by the end of the month CRITICAL</p>





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SIR Form 20 Instructions.

9/2/2020

Line by line suggestions for filling in Form 20

Submit to INFOSYS Roster Chairman (see the form for address) **and send copies to your Regional Director and Area Governor** prior to August 31. Do this even if you have not yet had elections. Your Branch Nominating Committee should know who these administrators are. Submit even if incomplete as you can always revise.

Don't forget to fill in the **YEAR** and **BRANCH** at the top.

1) LUNCHEON MEETING INFORMATION

a) **Establishment-**

- i) Name of establishment where the Branch members meet for the monthly luncheon meeting. Not the Branch corporate address.
 - ii) Remember, if your Branch meets at an Elks Lodge it is Lodge not Club
- b) **Street address-**The physical street address even if they don't have a USPS street address. Should be locatable using Map programs or a GPS system. People need to find you.
- c) **City and Zip** are pretty obvious
- d) **Week of Month**-Like "3rd"
- e) **Day of Week**-Like "Tuesday"
- f) **Lunch Start Time**-The time members sit down and start lunch and not the cocktail hour.

2) BRANCH EXECUTIVE COMMITTEE MEETING INFORMATION

a) **Establishment-**

- i) If same as Luncheon then put "SAME" in the establishment and skip to f).
 - ii) Name of establishment where the Branch BEC meets for the monthly BEC meeting. Not the Branch corporate address.
 - iii) Remember, if your Branch BEC meets at an Elks Lodge it is Lodge not Club
- b) **Street address-**The physical street address even if they don't have a USPS street address. Should be locatable using Map programs or a GPS system. People need to find you.
- c) **City and Zip** are pretty obvious
- d) **Week of Month**-Like "3rd"
- e) **Day of Week**-Like "Tuesday"
- f) **BEC Mtg. Start Time**- The time members sit down to start the BEC meeting.

3) BIG SIR

a) **First, Mi, Last**

- i) Avoid nick names. Some names may be used for corporate submittals to government agencies and nick names are inappropriate.
 - ii) **Mi** may be a name as in "T. Bones Pickens". In this case **First** would be "T."
 - iii) Be sure to get names like "de Paul" or "De Paul" or "DePaul" are correct. Good idea to check with the individual.
- b) **Nickname**-Leave blank if none.
- c) **Wife**-or companion. Usually just the first or nick name.
- d) **Telephone**-Include the area code. SIR standard is like this- "650-685-6971"
- e) **Mail Address**-Like "PO Box 109" or "109 La Mesa Drive" Include the **Drive**
- f) **City**
- i) Like "Burlingame"
 - ii) If city is in Nevada add "NV" like "Carson City, NV"
- g) **Zip**
- i) Like "94010"
 - ii) Add zip extension (+4) if known. Like " 94010-5919"



Form 20 Instructions



SIR BRANCH ADMINISTRATIVE
PERSONNEL FOR YEAR

FOR BRANCH NO

Please read "Form 20A Instructions" before you start. It only takes a minute and it helps all of us if the form is filled out correctly. Immediately after the election of Branch Officers or when you know who these administrators are, even if some positions may not yet be filled, submit this Form 20 to the State Roster Committee Chairman. It is due no later than **August 31**. Submit via Email attachment or US Mail. Send copies to your Area Governor and Regional Director. Report changes only as they occur during the ensuing months. Please make every effort to provide Email addresses, and enter them in CAPITAL letters with out hyperlinks. Email addresses are essential for SIR communications. **The State Roster Chairman is Dwight Sale, 109 La Mesa Dr, Burlingame CA 94010 His Email is DWIGHT.SALE@COMCAST.NET**

Form 20

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LUNCHEON MEETING INFORMATION		BRANCH EXECUTIVE COMMITTEE MEETING INFORMATION	
		If same as Luncheon then put in same for "Establishment" and put in the correct start time.	
Establishment		Establishment	
Street Address		Street Address	
City		City	
ZIP		ZIP	
Week of Month		Week of Month	
Day of Week		Day of Week	
Lunch Start Time		Mtg. Start Time	
BIG SIR		LITTLE SIR	
First MI Last		First MI Last	
Nickname		Nickname	
Partner		Partner	
Telephone		Telephone	
Address, Street or PO Box		Address, Street or PO Box	
City		City	
ZIP		ZIP	
EMAIL		EMAIL	
Joined Date		Joined Date	
BRANCH SECRETARY		BRANCH TREASURER	
First MI Last		First MI Last	
Nickname		Nickname	
Partner		Partner	
Telephone		Telephone	
Address, Street or PO Box		Address, Street or PO Box	
City		City	
Zip		Zip	
EMAIL		EMAIL	
Joined Date		Joined Date	

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Dennis Pangburn, Region 3 Director

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