

**The Mission of SIR is to improve the lives of our members through fun activities and events while making Friends for Life.**

# **RAMP**

**Recruitment, Activities, Member Relation, Publicity**

## **A Toolkit for Building our Branches**



**February 2019**

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## Section 1. Growing Our Branches

Successful implementation of RAMP and Nominating Committee efforts to provide a leader succession plan are critical elements for SIR Branch growth. This Toolkit provides the guidelines that when followed will ensure Branch health and growth. It is not an academic exercise – It is based on the study of successful Branches and the best practices they have developed and adopted. We urge all Branch leaders to study the suggestions in the Toolkit and apply them to their Branch's situation.

In 2015, we studied 24 growth Branches and contrasted how they performed against non-growth Branches. The characteristics of the 24 Branches are listed below:

- Mix of large and small branches – Median size of 135
- Mix of urban, retirement and rural geographies
- Average increase of three members a year
- ***Success did not depend on location or branch size***

We found that the following actions were those that apparently make the difference between growth Branches and their non-growth counterparts:

- Big Sir's recruiting focus at every opportunity
- Incentive for bringing guests
- Entertaining speakers
- Attractive venue with parking
- Space to mingle
- Excellent member communications
- Active, up to date website
- Focus on member relations
- Members volunteer readily
- Formal new member orientation and follow up
- Plans for leader succession for officers and chairmen

It is clear what YOUR Branch can do to improve:

- Consider the ideas presented in this booklet. They highlight best practices around SIR
- Be flexible, apply the tools to your best advantage
- Use the Branch Self Assessment to focus on your critical needs
- Use BEC members to chair RAMP Committees
- Use committees to ensure RAMP continuity as leaders change
- Contact the Chairman of the State Growth and Membership Committee with questions

Take the Branch Self-Assessment that follows, apply the best practices, and you will grow.

## Section 2. Self-Assessing our Branch

### 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. NomCom focus on multi-year succession, uses Three Step Process to obtain volunteers	
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**

1. Membership Trend – Obviously, if you lose net membership your branch becomes more at risk than if you had gained net membership
2. 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.
3. 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.
4. 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, parking, food and drink quality/value and speaker quality.
5. 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.
6. 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.
7. 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 re

## **Section 3. Recruiting and Publicity**

### **Recruitment Video Learning Points**

1. Make sure your members fully understand that the Branch has a membership problem.
2. Appoint a Recruiting Chairman with enthusiasm, drive and perseverance AND hopefully some experience in recruiting. Make sure you consider newer members for this role.
3. Form a Recruiting Committee. Use BEC members that do not have specific job responsibilities. It's also a great job for newer members.
4. Study what works. Ask other branches, review the State website, order brochures.
5. Engage the members with Sir Cards, incentives, recognition AND include their spouses and partners.
6. Place brochures where candidates gather – golf courses, bowling alleys, fishing retailers, senior centers, barber shops, etc.
7. You only have one shot at a first time guest, make it your best one!
8. First impressions are lasting impressions. Make sure the guest has a printed name tag, knows where to sit (consider a special table for guests and sponsors, provide a printed name card at the table, offer him a drink and if the branch has activity booths/tables set up, walk him through them – especially those he is interested in.
9. Introduce the guest and his sponsor at the luncheon, and have them stand  
Provide a guest package with a welcome letter, information about the branch and an application.
10. At the completion of the luncheon, ask him what he thought of the experience, and assess his degree of interest.
11. Contribute to a great website and keep it updated with lots of pictures of members and spouse/partners having fun.
12. Challenge new members to bring guests
13. Communicate the message at every BEC meeting and luncheon

Note: All videos are found at <http://sirinc.org/MemInfo/BOTraining2017/>.

## Recruiting Goal and Action Worksheet

Can Apply	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

Can Apply	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

## **Publicity and Image Video Learning Points**

1. Establish a Publicity Chairman and a Committee – it can be free standing and report to an officer or director or it can be part of another branch standing committee. Whatever makes sense in your branch's situation.
2. If you need publicity and image ideas, ask your Area Governor to have an an area roundtable meeting to discuss ideas from all the branches.
3. Consider setting a publicity and image goal and its associated action plans.
4. Obtain a full stock of Sir publicity brochures, cards and holders, and put them in places where our membership candidates tend to visit.
5. Work to get your meeting notices published in daily and weekly newspapers in you area. If it doesn't get published, work to find out why.
6. Establish alliances with other organizations that serve our membership candidates in your area.
7. Publicity works hand in hand with Recruitment, but direct, hands on recruiting is best done by your trained recruiters.
8. Consider new members to fill openings on your Publicity Committee.

Note: All videos are found at <http://sirinc.org/MemInfo/BOTraining2017/>



## 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.

<b>Can Apply</b>	<b>Potential Publicity and Image Goals</b>
	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

<b>Can Apply</b>	<b>Potential Actions to Meet Publicity and Image Goals</b>
	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
	Improve the Sir image at luncheons though effective use of the Sir Banner, signs, activity posters and activity information
	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
	Develop and/or modify branch recruiting brochures

## **Section 4. Activities**

### **Video Learning Points**

1. Appoint an Activities Coordinator and support him with a committee.
2. Involve new members and their ladies in activities early on. Put them in touch with your activity chairmen.
3. Use the application form to identify new members' interests. If you don't have an activity in an area, ask them to start one.
4. Keep your ear tuned to all members old and new; listen to them. They will often express thoughts like, "Why don't we do (fill in the blank)."
5. Involve the ladies! They love it, and they are a great source of recruiting other members from their friends spouses and partners.
6. Introducing guests to the branch first through an activity is likely a better way to convince them to join Sir than bringing them to the luncheon.
7. If your branch doesn't have enough members for an activity, join together with other branches in the Area

Note: All videos are found at <http://sirinc.org/MemInfo/BOTraining2017/>

## 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 activity efforts.

Can Apply	Potential Activity 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

Can Apply	Potential Actions to Meet Activity 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

## ACTIVITIES AND EVENTS

The monthly Branch Luncheon (with good speakers), Ladies Day Luncheons, picnics and BBQs are important activities. They must be in a good location with good food. Additionally, a wide selection of activities of interest to members and their partners are vital for member satisfaction. The interest and excitement of members will be enhanced by continually asking them to identify activities of interest to them and their partners and then creating at least ten activities in each Branch. Branch Activities Committees are very important in this effort.

Following is a list of some popular activities in which SIR members and partners are participating:

Antique Cars	Dancing, Couples	Investments	Stamp Collecting
Astronomy	Dining In, Couples	Men Dine Out	Table Pool
Backgammon	Dining Out, Couples	Mexican Train	Tennis
Barbecuing	Dominoes	Model Railroading	Theater, Stage & Movies, Couples
Biking	Explore and Dine, Couples	Pedro	Time Shares
Bocce Ball	Fantasy Baseball	Photography	Travel, Couples
Book Groups	Fantasy Football	Ping Pong	Walking
Bowling	Fishing	Pinochle	Walking, Couples
Bridge, Duplicate	Gardening	Poker	Woodworking
Bridge, Party	Genealogy	Pool Billiards	Wine Tasting, Couples
Bridge, Couples	Golf, Eighteen Holes	Radio Amateur	Writing Life Stories
Chess	Golf, Nine Holes	Recreational Vehicles	Veterans
Coins	Golf, Couples	Singing, Barbershop	Yoga
Computers	Hobby Display	Singing, Chorus	
Cooking	Hiking	Softball	
Cribbage	Horseshoes	Sports events, Couples	

## **Section 5. Member Relations**

### **Video Learning Points**

1. Make sure you have a new member orientation on the day he is accepted for membership.
2. Include the new members' sponsors, the Member Relations Chairman, the Membership Chairman, the Activities Coordinator, and the Big and Little Sirs.
3. In orientation stress the importance of joining activities, bringing guests and serving as well as being served. When asked to be a volunteer, the expected answer is, "I'll give it a shot."
4. Call the member back after five or six months, and check to see how he is doing, if he's joined activities and what we can do to provide him a better SIR experience.
5. Your member relations committee is responsible for assessment of the entire member experience, from the attractiveness of the facility to the effectiveness of the program and the value of the food.
6. A periodic survey of members is important, and suggestions for such a survey can be found on the State website as well as contacting the Growth and Membership Committee.
7. Effective member relations can reduce turnover five percent a year, because it helps the branch provide value to its members.

Note: All videos are found at <http://sirinc.org/MemInfo/BOTraining2017/>

## 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.

Can Apply	Potential Member Relations Goals
	Increase the 2016 guest-to-new member conversion 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 team

<b>Can Apply</b>	<b>Potential Actions to Meet Member Relations Goals</b>
	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 on how members rate the branch in various areas and on items needing addition, improvement, and/or elimination. (depending on branch size, all members or part of the branch annually)
	Improve the branch culture through New Member Orientations and other means for members to not only “be served” but to “serve and be served.”
	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.
	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.
	Ensure guests are made to feel welcome and appreciated



## **New Member Orientation Meeting**

The New Member Orientation meeting is a key element in familiarizing a New Member to SIR and to the branch as soon as possible. It is very important: to be welcomed by some of the branch leaders in an informal setting, and tell him about SIRinc, the branch, its culture; and to encourage his involvement from day one..

**Orientation Meeting Date/Time:** There always should be an Orientation Meeting as soon as possible after the application is approved by the BEC, even though there may be only one new member that month. The branch decides whether the orientation takes place before or immediately after the luncheon program. The meeting should take place in a separate quiet room if possible. If held prior to the luncheon meeting, the new member and sponsor must remember to arrive earlier than usual, and everyone can leave after the luncheon program. If held after the luncheon meeting, all participants are probably available, but they will not be able to leave until the orientation meeting is finished.

**Participants:** New Members and their sponsors need to be invited to the orientation meeting prior to the luncheon meeting date. Usually, the Membership Chairman contacts the new member and the sponsor a week or so prior to the luncheon to confirm they will be at the upcoming luncheon and where and when to meet. If the orientation is held after the luncheon program, participants are reminded where to go immediately after the meeting.

A suggested participant list – the new member, with or without his sponsor, the Meeting leader who is typically one of the following: Big Sir, Little Sir, Member Relations Chairman, Membership Chairman, or Activities Coordinator. The Big or Little Sir should attend to kick off the session and welcome the new member to the branch.

### **Orientation Topics**

The Orientation Leader ensures the following is covered by himself or another leader. Work to make the orientation session interactive. Remember, nobody likes lectures. The following topics should be covered. Highlights of each topic are found in the Appendix.

<b>Item</b>	<b>Topic</b>
<b>1</b>	Welcome the new members.
<b>2</b>	Thank the sponsors – keeps membership more vital and enthusiastic.
<b>3</b>	Give a brief history of SIR, its organization and objectives. (see Appendix, Item 3).
<b>4</b>	Note whether there are annual dues or voluntary contributions (See Appendix, Item 4).
<b>5</b>	Our Symbol is the Rooster. (see Appendix, Item 5).
<b>6</b>	Review the contents of the orientation packet, covering the highlights
<b>7</b>	Our member expectations (see Appendix, Item 7).
<b>8</b>	Encourage the new member to attend BEC meetings periodically that are open to all members.
<b>9</b>	Summarize activities (see Appendix, Item 9).
<b>10</b>	Explain the importance of bringing guests. (see Appendix, Item 10).

<b>11</b>	Summarize attendance requirements (see Appendix, Item 11)
<b>12</b>	Focus on volunteerism. (see Appendix, Item 12)
<b>13</b>	Before adjournment, are there any questions or comments

## **Appendix – Talking Points by Topic**

### **Item 3- Brief history of SIR:**

Damian Reynolds was a retired engineer from San Mateo who had an idea resulting in SIR formation. He met for lunch with three of his friends in July 1958. They 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”. The name SIR 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.

Organization and Objectives: It is a 501(c)(4) 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.

#### **The SIR Mission**

The Mission of SIR is to improve the lives of our members through fun activities and events while making Friends for Life

Geography- Oregon border to Bakersfield and San Francisco to South Lake Tahoe. Membership – Approximately 15,000 members in 126 Branches. There is no paid staff throughout the organization. State Organization – It has a President, V P, Secretary and Asst. Secretary, Treasurer and Asst. Treasurer, Chief Administrative Officer and five Regional Directors typically responsible for four Area Governors each. There are 19 Area Governors typically responsible for seven Branches each. Branch Organization – Each branch has a Big Sir (Chief Executive Officer) Little Sir, Secretary, Asst. Secretary, Treasurer, Asst. Treasurer, and 2-6 Directors along with numerous Committee and Activity Chairmen. Each branch is issued a number, and is a stand-alone corporation.

**Item 4: Dues or Voluntary Contribution:** advise whether mandatory dues or voluntary contributions to offset branch administrative expenses and quarterly assessments to State SIR for liability insurance and other administrative expenses.

**Item 5: Our Symbol is the Rooster:** Selected at our beginnings as a majestic animal

**Item 6: New Member Packet:** During the orientation, new members receive a new member packet. It is recommended that it contain the following materials:

Welcome letter, with his badge number. History of SIRinc. (Appendix Item 3) History of the branch. Hard copy of the latest Branch Membership roster, or how to access it. Luncheon reservation system.

Attendance requirements (Appendix Item 10) Branch luncheon dates/time/location.

Special events during the year- e.g. Ladies Days, BBQ, etc. sirinc.org website and branch website access, including passwords. Branch activities list for members and couples.

New Member brochure, Activity fliers or tri-folds about SIR. Copy of the monthly newsletter.  
Application form, for new member to give to his 1st guest. Also, instructions on how to sponsor a guest.  
SIR Rooster pin

**Item 7: Our Member Expectations:** We expect our members to:

- be friendly,
- participate in activities,
- bring guests; to have them join in the fun, make friends for life, increase/improve
- activities and perpetuate the Branch
- Serve on administrative or activity committees/teams (When asked, our expected response is a “Yes” or “I’ll try.”) It takes a lot of us working together to make our branch what it is. You, as new members are invaluable to us as we replace the guys who have been doing the work for years. Consider taking on one or more of our many leadership roles in the future..

**Item 9: Activities:** Summarize the branch activities. Encourage new members to become involved in at least one activity, ask about interests and follow up with activity chairmen as appropriate. The activities are for active members and their guests. The travel program may also include guests and your spouse. Note Ladies Day and other coed activities/events.

**Item 10: Importance of Guests:** Explain that the branch only survives by the steady input of first time guests. Each year the typical branch loses 16% and our branch typically has annual turnover of XX% (use your branch annual turnover number) of it’s members. The vast majority of these loses are health-related, moving from the area and the necessity of taking care of a loved one. Our older members have bugged everyone they know who might be a member, so that well starts to run pretty dry. It’s new members who can attract their associates and friends, or someone who could become a friend, that sustain our membership by bringing guests.

**Item 11: Attendance Requirements:** By rule, members are required to attend a minimum of one-half of the regular luncheon meetings within the previous twelve months unless the Branch BEC votes otherwise. If you are going to miss a meeting remember to call in by the deadline. (Inform them of the branch process for call-ins or email notifications.) If a member misses three consecutive meetings or more than half of the regularly scheduled meetings, he will receive a telephone call asking if he’s alright and inquiring if he is still interested in the branch and SIR. A member can make up meetings by attending another branch meeting.

**Item 12: Volunteerism:** The spirit of VOLUNTEERISM keeps SIR a viable and fun filled group. SIR members are all volunteers, and new members can start that involvement by inviting one or two friends/neighbors to the next luncheon. An application form is included in the envelope for such use.

**An Example of a Feedback Card That Can Be Placed at Each Luncheon Table**

<p>Hey BEC!</p> <p>I'm            Impressed                   Pleasantly Surprised                   Satisfied                   A bit annoyed                   Mad as the dickens</p> <p>And here's why (over) ►</p> <p>Dear Guest/Applicant/Member:</p> <p>Our most important concern is you. We need the benefit of your viewpoints, observations and impressions. Your feedback and opinions are of great value to us in making our Branch the best branch in SIR.</p> <p>If we've disappointed you please tell us about it. If you are pleased, we'd like to hear that too. We want to make your SIR experience the best one possible</p> <p>Best regards, Your BEC Team</p>	<p>Date: _____</p> <p>I am a – please circle one Guest            Applicant                          Member</p> <p>When completed, place this card in the badge return box.</p> <p>Please use space below for your comments:</p> <p>Optional Information: Name and Badge :</p>
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## Section 6. How to Successfully Recruit Volunteers and Leaders

### Three Steps to Success

There is no silver bullet to use when recruiting leaders and team members. It takes time and thought; however, following the three steps outlined below will significantly improve your recruiting success.

#### Let's start with things not to do:

- Expect that asking for volunteers will get candidates
- Go it alone
- Make it a long term commitment
- Assume that “No” means “Never”
- Fall for the ABIC trap. What does ABIC stand for? Any Butt In the Chair
- Conduct a recruiting interview without thorough planning

The primary way things get done in SIR is through drawing on personal relationships and being prepared. Effective recruiters use Relationships to identify future branch leaders and team members, then it's a three step process – Preparation, Contact, Discussion.

#### Step 1. Preparation

1. Develop a written description of what you need to have the prospect do. Your job description is a good place to start in addition to materials on the [sirinc.org](http://sirinc.org) website.

2. Review the list of Sir Leader Valued Behaviors. Ask yourself: “Which of those behaviors are particularly important for the job you are recruiting for?”

- Enthusiasm
- Open mindedness
- Recognition
- Influence others
- Consensus problem solving and decision making
- Knowledge of SIR

3. Think of those branch members you are acquainted with, and develop a candidate list. Given the job you have described and the valued behaviors you have selected, who has the right stuff?

4. If you can't come up with enough suitable candidates, contact other leaders in the branch for suggestions. The Branch Nominating Committee might be a useful source.

5. Once you have your candidate list, go through it and think about the reasons each candidate might decline the job. Some possible reasons might be:

**I'm too busy** – Have an accurate estimate of the time it is likely to take and share it with him. Narrow the job down to take less time. Point out that the donation of his time will significantly help the branch grow and prosper.

**I'm gone/travel too much** – Tell him that other team members can take up the slack while he's gone

The job you've described doesn't interest me – Ask him what role in the branch he'd like to fill, and get the leader of that role in touch with him.

**I'd like to help, but I'm afraid I'll be sucked in forever** – Ask if he can serve for a year or six months, then reassess after that time is up.

## **Step 2. The Contact**

1. Make your contact with the candidate in person, maybe before or after a branch meeting, at the golf course or 19th hole, etc. -- in at least a semi-private place.
2. If necessary, phone him and ask him out to meet you for coffee or a drink. Do not discuss the job or the reason for the meeting over the phone. If it comes up, tell him you want to show him something, and get his reaction to it. In fact, you'll be showing him the job description for the job you are recruiting for.
3. If you are not particularly acquainted with the candidate, consider asking a mutual friend you have clued in to set up a meeting with the three of you.
4. If there is going to be more than you and the candidate involved, make sure that you and your “helper” arrive at the meeting at the same time so the discussion will not get started prematurely. Also, make sure that each of you is clear regarding the role to be played during the discussion.

## **Step 3. The Discussion**

1. Begin the discussion by getting the candidate to talk about his experiences in Sir. Ask him about activities he belongs to, what he thinks of the luncheons, how his wife enjoys the branch coed activities, how many friends he has made, etc. The key is to get him talking.
2. Then follow up with, “As you know (Name), I've been appointed (your role) Chairman for the branch. It's a critical role (enter reasons why it's critical). I've given a lot of thought to who might be the ideal guys to help me, and your name is on the top of the list.”
3. Here's a description of the job that the branch and I need you to do. I plan to recruit (include number) more guys so we can spread the workload around. That way none of us will have an excessive burden to carry.
4. I can promise you all the training and support you will need. So now, what do you think about taking this role? Wait for the answer!
5. The candidate will either accept (great), or present objections to accepting.
6. If the candidate objects, you must answer the objections (hopefully, you'll remember the responses in Step 1), and close the presentation again. This might occur several times before you receive a final response. If the prospect does not accept the position, you should repeat the process with the number two prospect – who now becomes number one. You should also determine what future branch role he might be interested in, and pass that information to the Nominating Committee Chairman.

## Selecting Leaders Video Learning Points

1. Recruiting is not an event, it's a year round process
2. Staff your Nominating Committee with the "right" membership
  - Collectively they have a wide range of member contacts
  - They are respected
  - They are not going to be candidates for any position
3. Re-elect all officers every year even if they have multi-year terms
4. Maintain candidate succession lists for each position
  - Candidates from previous years
  - Volunteers solicited from the branch
  - Newer members
5. Build a new member list
  - Name
  - Sponsor
  - Last company worked
  - Activities
  - Branch leadership roles
6. Use the "Three Steps"
  - Preparation
  - The Contact
  - The Discussion

Note: All videos are found at <http://sirinc.org/MemInfo/BOTraining2017/>

## **Section 7. Setting Our Goals**

### **Goal Setting Video Learning Points**

#### **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.”
- Break goals into specific, time-based actions
- Assign responsibilities
- Establish start and completion dates
- Set priorities

##### **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 – Update and develop new goals**

Note: All videos are found at <http://sirinc.org/MemInfo/BOTraining2017/>



## Goal and Activity Planning Worksheet

Completed By: \_\_\_\_\_ Branch No. \_\_\_\_\_ Date: \_\_\_\_\_

Title

Goal	Activities	Start/End Dates	Responsible Sir(s)
1.			
2.			
3.			
4.			