

# State Town Hall Meeting

## February 2020 – 9:00 to 1:30?

Fairfield, Yuba City and Santa Clara, CA



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

# **Welcome to 2020's Town Hall**

## **Town Hall Opening – Ed**

- **Call to order**
- **Pledge**
- **Invocation**
- **Welcome SIR leaders**
- **Introduce Officers in Attendance**

# President's Remarks

## Key agenda topics

- 2019 in review
- 2020 Strategy
- I'm Doing My Part Program
- 2020 Growth and Membership Plan
- 2020 Finances
- Activity comments
- General updates
- Questions from the floor

## Reasons for today's survey

- Major problems filling RD/AG positions
- Deposit survey when you leave

# SIR Inc. Financials at Year End 2019

Account	Actual	Budget	Variance	Notes
<b>REVENUE</b>				
Cash on Hand	\$5,864	\$10,864	(\$5,000)	carried into 2020
Assessments	\$83,643	\$83,209	\$434	
Other	\$5,630	\$2,975	\$2,655	
<b>Total Revenue</b>	<b>\$95,137</b>	<b>\$97,048</b>	<b>(\$1,911)</b>	
<b>EXPENSE</b>				
Administration	\$8,304	\$7,950	(\$354)	
Insurance	\$46,654	\$50,000	\$3,346	
Committees*	\$4,675	\$5,550	\$875	
State Mtgs**	\$14,400	\$16,500	\$2,100	
Regions	\$20,605	\$20,500	(\$105)	
<b>Total Expense</b>	<b>\$94,638</b>	<b>\$100,500</b>	<b>\$5,862</b>	
<b>2019 Results</b>				
<b>Variance</b>	<b>\$499</b>	<b>(\$3,452)</b>		<b>On target!</b>

# **2019 Membership Results**

**In 2019 the Inactive Category Was Removed**

**We Believe that a Number of Inactives were Converted to Active**

**This Has Made Year to Year Comparisons Difficult**

**As Best We Can Determine, We Lost 3.6% of Our Membership**

# 2019 Membership Results

<b>Region</b>	<b>At-Risk Branches</b>	<b>Branches Lost</b>
<b>1</b>	<b>5</b>	<b>1</b>
<b>2</b>	<b>4</b>	<b>1</b>
<b>3</b>	<b>6</b>	<b>1</b>
<b>4</b>	<b>5</b>	<b>1</b>
<b>5</b>	<b>3</b>	<b>1</b>
<b>Total</b>	<b>23</b>	<b>5</b>

# Assessing our 2019 Performance

**Recruiting** – D Continued to lose membership

**Member Satisfaction** – F No action of providing an easy way for Branches to conduct member surveys

**Recognition** – C Continued HLM and age-based awards, Best Branch in SIR program

**Communication** – B Held Town Hall, Annual Meeting, Happenings, improved ability to contact leaders and members

**Leadership** – C Filled the usual number of jobs, trained NomComm Chairmen, volunteerism still a huge issue, non-participation in training

# Assessing our 2019 Performance

**Member Expectations – C** Video received little emphasis, included statement on application and induction oath

**Women's Group Involvement – F** None that we are aware of

**Community Recognition – D** Some efforts at farmers' markets, expositions, parades

**Overall Grade – C-** Need to do better



# **SIR 2020 Strategic Direction**

## **Increase SIR net membership**

- **Inform and energize members through video**
- **Recognize those members bringing in guests**
- **Update recruiting literature**
- **Focus on activities**
- **Reduce avoidable turnover by Improving Branch processes**

## **Improve Volunteerism**

- **Inform and energize members through video**
- **Recognize Key Branch Volunteers**
- **Emphasize SIR's Member Expectations**

# Bringing Our Strategy to Life

## The Issues:

- **SIR has a continuing membership loss**
- **Approximately 90+ percent of our members come from current members bringing guests**
- **Approximately 15 percent of our members are responsible for bringing the bulk of our guests**
- **Newer members are more likely to bring guests and volunteer – few new members = fewer guests and volunteers**
- **Member retention needs more focus in many Branches**
- **Volunteerism has become a critical SIR problem**
- **It is believed that the vast majority of our members are not fully aware of the problems**

# **Bringing SIR's Strategy to Life (cont'd)**

## **We Tried a Membership-Building Recognition Program in 2011, "The Legacy of One" It Failed**

- **Program wasn't sold to the Branches and members – no buy-in**
- **No communication to the members**
- **No real incentive**
- **No associated collateral materials**

## **A Partial Solution Is at Least Fourfold**

1. **Acquaint BECs with their fiduciary responsibilities – SIR must gain members**
2. **Obtain leadership buy-in**
3. **Create member awareness of the issues throughout SIR**
4. **Initiate a recognition/incentive program**

**Thus, A Solution Requires Buy-in, Communication, Collateral Material and Recognition/Incentives**

# Introducing the “I’m Doing My Part Program”

## Program Objectives

1. Acquaint BECs with their fiduciary responsibilities
2. Energize our members **and their spouse/partners** to recruit
3. Encourage more members to volunteer

**Members who bring a guest (including spouses/partners who made the contact) or perform(ed) significant volunteering service will receive:**

- Recognition at the Branch luncheon
- State initially supplied pins indicating that “I’m Doing My Part”
- Recognition and a picture in their Branch bulletin
- Branches may expand the reward if they so desire
- Volunteer recognition during May 2020 – SIR Volunteer Recognition Month
- Monthly recognition for any member who brings a guest in 2020

# Introducing the “I’m Doing My Part Program”

## Communication Package to Introduce Program at Town Hall Meetings

- Eight minute **video** to be shown to **all BEC members** outlining Director Fiduciary Responsibilities
- Fifteen minute **video** to be shown to **all Sir members** outlining the 2020 strategy, member expectations and why we are implementing the program
- Updated recruiting brochures
- Updated Sir cards
- Prototype “A Frame” boards

# New and Revised Recruiting Collateral

## The I'm Doing My Part Lapel Pin



# Revised General Recruiting Brochure

**Are You Ready To Join Now?**  
We have Branches throughout  
Northern and Central California

Here's Our Branch Information



**The Social  
Organization  
for Men**

Live longer and happier with good  
friends while enjoying many  
activities.



**There is *nothing* like  
SIR**

Friendship, social, physical  
and mental engagement and  
the opportunity to increase  
**YOUR** life's quality and length

**OR**

You can check us out on our website  
**[www.WeAreSir.com](http://www.WeAreSir.com)**  
or call us at (925) 331-0444

Email or leave a message; one of our  
volunteers will get right on it and refer  
you to a local Branch where you can  
start having fun and making friends



# Revised General Recruiting Brochure

## Make New Friends for Life!

SIR Branches provide a mix of activities: **Golf, Bowling, Bocce, Card Games, Dining Out, Walking, Travel, Book Groups**, and others...

## Live Longer- Live Healthier

*I was cutting back at work and had a lot of free time, but I was spending it all at home. SIR got me out of the house and involved*  
- Tony D.

*Many of my friends were still working and some had even moved away. Frankly, I was lonely. SIR cured that. I'm a happy, lucky guy!*  
- Bill S.

Studies show there is a 70% less chance of developing cognitive disorders if you have an active social life.

## We have a few member expectations

*Be a friendly, sociable guy  
Have some free time to participate in our activities, luncheons and events  
Volunteer occasionally to help your Branch  
Introduce others to SIR so they can join in the fun ...*

SIR is a Non-Political,, Non-Profit 501c(4)  
Organization.in Northern and Central CA

## Wives and Partners Are Welcome



*When my husband joined SIR it not only gave him a whole new circle of friends and activities, it gave me the same. As a couple, we have met so many new, fun people. There are many activities for couples such as potlucks, dine-out's, golf, day trips, and wine tasting . SIR has added greatly to our enjoyment of life.*  
- Donna B.

**Give your wives or partners  
a chance to make their own  
new friends for life too...**

**Come join us and be  
part of the fun**



# Free Lunch Card



# Sandwich Boards

A frame, double-sided

Total cost ~ \$130



# Volunteer Commemorative Items



# **Sir Marketing Website**

## **www.WeAreSIR.com**

**Prototype Developed About Two Years Ago**

**Couldn't Find Project Manager and Technical Skills**

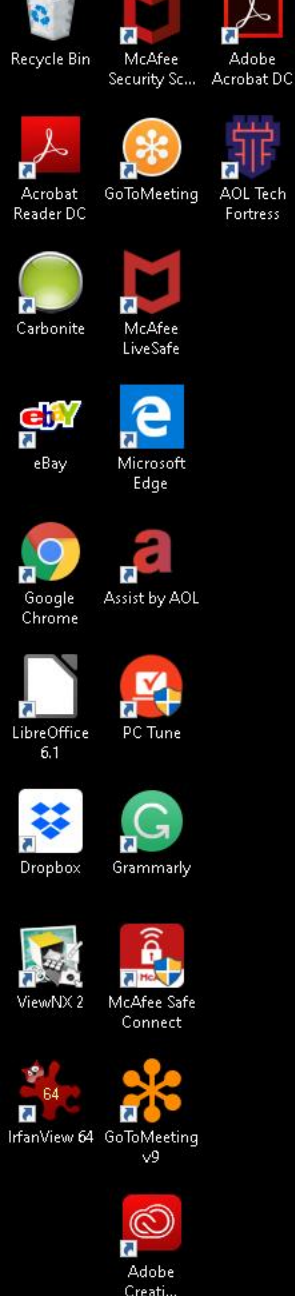
**Treasurer stepped up – Led Project**

**Found Inexpensive Website Designer**

**Final Website Completed February 2020**

**Uses**

- **Will appear on all State recruiting materials**
- **Will be the default website for Branches without a website they are proud of**
- **Working to attract men searching for a social/activities group**



SIR NorCA Activities | Home

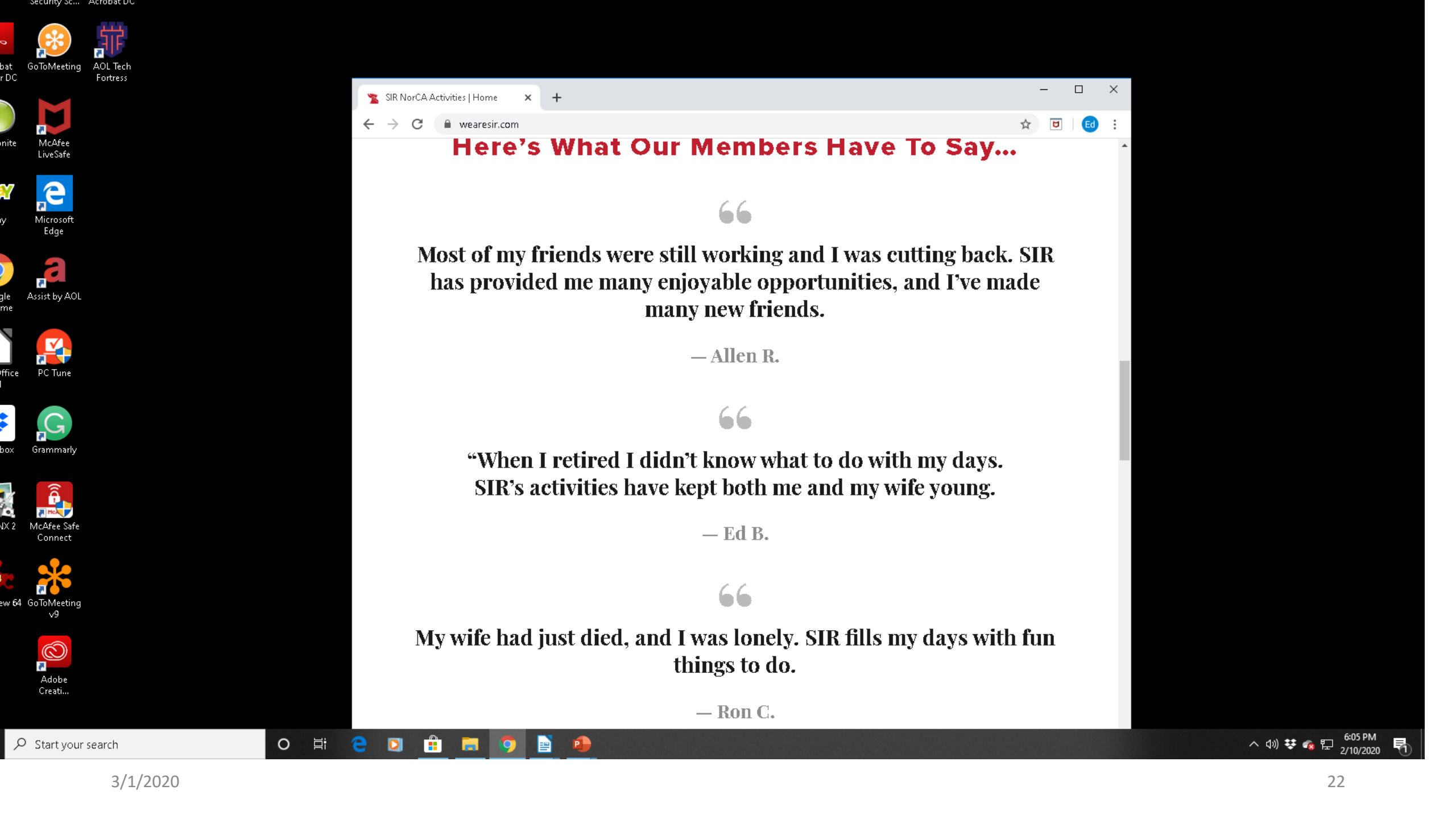
wearesir.com

SOCIAL ACTIVITIES FOR MEN

Our activities provide social, physical and mental engagement for men over 50 and their partners. We live longer and have more fun!

# WE ARE SIR

Based in Northern and Central California, our Branches provide a range of activities: and many are coed!



SIR NorCA Activities | Home

wearesir.com

## Here's What Our Members Have To Say...

“

**Most of my friends were still working and I was cutting back. SIR has provided me many enjoyable opportunities, and I've made many new friends.**

— Allen R.

“

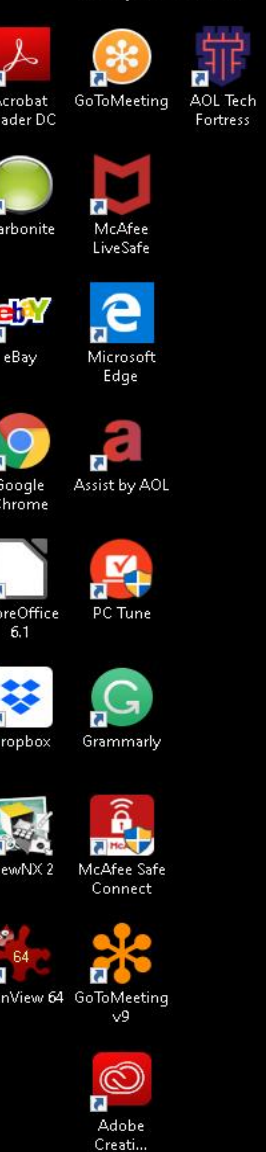
**“When I retired I didn't know what to do with my days. SIR's activities have kept both me and my wife young.**

— Ed B.

“

**My wife had just died, and I was lonely. SIR fills my days with fun things to do.**

— Ron C.




SIR NorCA Activities | Home | how to edit screenshot - Yahoo S | How to Edit a Screenshot in Micro | +


wearesir.com

## Welcome To SIR

We have a short **VIDEO** that you'll like. Turn on your speakers and click on the red play button.



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## Our Activities

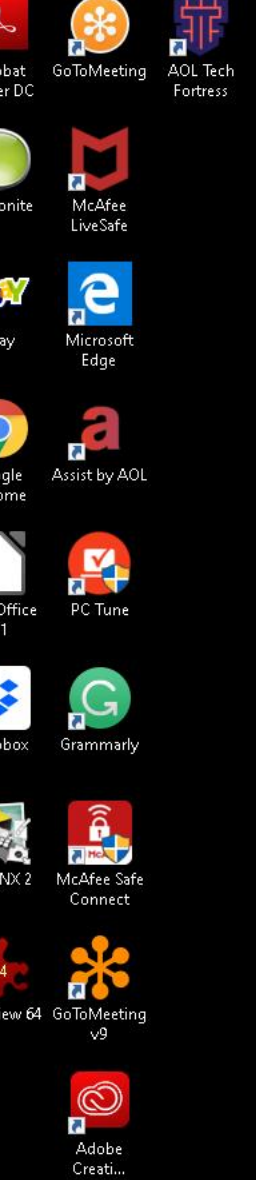
We are an active and social bunch - take a look at what we do.

[LEARN MORE](#)

Start your search



6:28 PM 2/10/2020




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wearesir.com

## Take Action

Ready to take the next step?  
Contact us, and we'll refer you to a SIR Branch. Then you'll be able to participate in our activities and enjoy life more!

**FIND OUT HOW**



Connect With Us On Facebook



# Implementation

## Steps

1. Obtain Board approval for mandatory program - Done
2. Develop program documentation - Ed
3. Introduce at our three February Town Hall meetings with the video and ppt slides and attain buy-in - Ed
4. Follow up with Big Sirs not at Town Halls – AGs
5. Present program to Branch BECs for buy-in – BS/AGs
6. Determine which SIRs should get initial batch for volunteerism and 2020 bring a guest awards - BEC
  - **May 2020 will be SIR Volunteer month**
7. Order pins, new brochures and Sir cards for recruiting – BS
8. Consider ordering a commemorative item from VistaPro for volunteers - BS
9. Present videos at each Branch - BS
10. Praise recipients, take pictures, include in Branch bulletin - BS
11. Repeat Step 10 monthly throughout 2020 - BS

# **2020 Growth & Membership Plan**

**Fully staff the Committee with active and knowledgeable Sirs**

**Halt SIR net membership loss**

- **Explain the situation to ALL Sir members – Member video**
- **Improve recruiting tools – Approval to revise and print granted**
- **Develop a recommended Branch guest protocol – G&M & P&P**
- **Improve public awareness of SIR – Publicity Handbook for Branches**
- **Reduce preventable turnover**
  - **Encourage member surveys – Ed & Derek**
  - **Revise orientation template – G&M & P&P**
  - **Develop 4 to 6 month member feedback session – G&M & P&P**
  - **Develop a sponsor responsibility checklist – G&M & P&P**
  - **Encourage more activities including shared, Area and Region – G&M**

# **2020 Growth & Membership Plan – cont'd.**

## **Improve volunteerism**

- **Continue to work with NomComms on succession planning – Regions and Areas – Email/survey to BSs**
- **Ensure SIR Member Expectations are included in Branch initiation oaths – G&M and Areas**
- **Explain the situation to ALL Sir members – Member video update**
- **Train Branch leaders on how to recruit – Town Halls, Regions, Areas and annual training**
- **Encourage consolidation of leadership positions in small Branches – Regions and Areas (As opportunities are presented)**

# SIR Inc. 2020 Budget Overview

Account	2020 Budget	Total
<b>REVENUE</b>		
Cash on Hand (>\$14k)	\$5,000	
Assessments	\$93,672	
Foreign Travel	\$2,500	
Other	\$75	
<b>Total Revenue</b>	<b>\$101,247</b>	<b>\$101,247</b>
<b>EXPENSE</b>		
Administration	\$8,400	
Insurance	\$51,000	
Committees	\$5,850	
State Mtgs	\$15,100	
Regions*	\$23,750	
<b>Total Expense</b>	<b>\$104,100</b>	<b>\$104,100</b>
	<b>Projected Deficit</b>	<b>(\$2,853)</b>

\* Includes 4Q2020 Branch Officer training expenses

# SIR Inc. 2020 Budget vs 2019 Actual

Account	2019 Actual	2020 Budget	Variance	Notes
<b>INCOME</b>				
Cash on Hand	\$5,864	\$5,000	(\$864)	carryover \$7 / member Branch closings
Assessments	\$83,643	\$93,672	\$10,029	
Other	\$5,630	\$2,575	(\$3,055)	
<b>Total Income</b>	<b>\$95,137</b>	<b>\$101,247</b>	<b>\$6,110</b>	
<b>EXPENSE</b>				
Administration	\$8,303	\$8,400	\$97	2019 low vs budget
Insurance	\$46,654	\$51,000	\$4,346	
Committees	\$4,675	\$8,850	\$4,175	
State Mtgs	\$14,400	\$15,100	\$700	
Regions	\$20,605	\$23,750	\$3,145	
<b>Total Expense</b>	<b>\$94,637</b>	<b>\$107,100</b>	<b>\$12,463</b>	

# **2020 Best/Most Improved Branch Award**

## **Three Award Programs**

- **Best Branch in SIR, 1<sup>st</sup> and 2<sup>nd</sup> runners up**
- **Most Improved Branch in SIR, 1<sup>st</sup> and 2<sup>nd</sup> runners up**
- **Area Governor's Branch Citation Award**

**Same Criteria as 2019 – Branch Size, Nature of Recruiting Market, Bank Balance not Deciding Factors**

**Need Two Years of Data for Most Improved Branch Applications**

**Each Branch Big and Little Sir Will Receive an Email Describing the Process and Where to Obtain Application Forms**

**Applications Due to AG by May 15**

# **State Activity Committee Reports**

## **Travel**

- **Great need for a State Travel Chairman for 2021**
- **No State Chairman, no Travel Activity**

## **Bocce**

- **Bocce is a major SIR opportunity activity area that deserves Sir-wide support**

## **Recreational Vehicles**

- **Regions have not shown much support for a State-wide activity**
- **A State-wide Sir RV convention will be scheduled for 2020**

# **State Activity Committee Reports**

## **Bowling**

- **Tournament participation decline of 9.5% could be due to lacking publicity and commute traffic**
- **Need for new sponsors to replace discontinued tournaments**

## **Golf**

- **Big Sirs – Help your Branch Golf Chairmen collect golfer information for State Golf**
- **Leverage Golf as a means to attract guests/members to Sir**

## **Sirs at the Games**

- **A's/Giants approved; Day at the Races scheduled**
- **Chairman is willing to help similar activities in Area/Branches**



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# **2020 Updates**

**Branch Schedule of Operations – Use it please**

**Quarterly Assessments – Due by 15<sup>th</sup> of January, April, July, October**

**Application Form – Use current form**

**Induction Oath – Include Sir Member Expectations in your Induction Oath**

**Activity Approval in January – BEC approval is critical for insurance purposes**

**Direct-Hire Caterers – Don't forget Ladies' Day, Picnics, BBQs**

**Including Women at Branch Lunches – Treat as an activity, 2/3rds BEC and Member approval required**

# 2020 Updates (cont'd.)

**“Satellite Branches” – Consider “adoption” of smaller Branches by larger Branches in the Area**

**Sir Merchandise – Up and running, <https://sir.go.customprintcenter.com/>**

**Constant Contact Update – Has not been readily adopted, contact Rick Sale, ricksale17061@gmail.com**

## **Status of Membership List Collection**

- Replacing annual roster and email address collection
- Due in Excel format by February 15

## **SIR Foundation Update**

- Funds distributed
- “Worthy Cause” statement being reworked

**In Conclusion...**

**Questions/Observations from the  
Floor**

**Adjourn**