

Leader's Guide
A Stands for Activities
(Entire section takes about three hours)

.Section 1. The Job of the Branch Activity Chairman/Coordinator (take about 15 to 20 minutes)

1.1 Obviously the job of the Activity Chairman is critical to branch success. Activities are the glue that holds the branch together. It is through participating in activities that our members connect with each other and make friends for life. The more and varied activities that a branch has, the more likely it will be healthy and be able to recruit new members.

Coed activities are also of critical importance. A large number of coed activities creates branch health. Not only do our spouses and partners enjoy them, it allows them to meet, interact and become friends. These friendships have let to Sir spouses and partners joining together into their own social group. If a spouse or partner is engaged, she ensures that the Sir member will stay with us for a long time.

- **Handout R 1 Job Description, Branch Activity Chairman/Coordinator/Team Leader**

Your job's responsibilities are clearly spelled out in this job description. Let's take a few minutes for each of you to read it.

Allow time for participants to read the description, then ask, **“Who has questions?”** Respond to the questions. The participants will likely ask what is this SIR Leader Valued Behavior stuff? Tell them we'll discuss that later in this session.

Ask, is everyone clear about what this job is? Respond to questions, and create clarity.

Section 2. The Activity Video and Its Learning Points (take about 15 minutes)

2.1 Prior to this training session, you were asked to review the Activity video, learning points and RAMP handout found in the Branch Officer Training 2016 section of the State website. I'm going to assume everyone has done that.

2.2 The video ended with a number of learning points. They are included in this handout

- **Handout A 2 Activity Video Learning Points**

Discuss Learning Points after group has read the handout. Prompt the group by asking the following questions:

- What do you think about these learning points?
- Does your branch face similar problems as depicted in the video?
- Which learning points are especially important to your branch?

Section 3. The Interactive workshop (Take about an hour and fifteen minutes including a

ten minute break; allow about twenty minutes for each goal

3.1 Now we are going to enter into the fun part of the training. I'm going to give you a set of three hypothetical activity goals, and we as a group are going to brainstorm actions that you can take back to your branch that will help meet them.

Training Leader's Note: Here is where the training leader must practice his best facilitation skills. Draw the group out, and make them think. Go around the table get a suggested action from each participant, and keep going until they run out of potential actions they could take. Check their answers against those provided below. If they run out of ideas, use your potential actions to stimulate discussion. Don't be afraid to allow duplicate actions in more than one goal area.

Here's the goal worksheet; there's room to write your suggested answers below the goal. During our discussion you may want to write down the ideas suggested by others that might work in your branch.

- **Handout A 3 Activity Goal Worksheet**

Now, let's work on Goal 1. (Repeat this process for each of the three goals) Is everyone clear on what I'm asking you to do? Read the goal and think of potential actions that will lead to the goal's accomplishment.

Goal 1. *Institute a Branch Activities Coordinator and Committee to increase the range of member activities*

Potential group responses:

- Appoint an Activity Chairman/Coordinator for the branch
- Initiate an Activity Committee
- Study how other branches do it
- Build a description of the team member's job
- Survey members for their activity interests
- Review the applications of members with three years or less membership to see what interests they included on their applications
- Develop a list of why activities are important to the branch
- Determine who is most active in branch activities, and recruit him on to the team
- Talk to new members in orientation to determine what activities they are interested in
- Ensure guests are made to feel welcome and appreciated

Goal 2. *Begin four new activities this year*

Potential group responses:

- Review the list of the 75 activities in Sir as found on the sirinc.org website to generate activity ideas
- Review Sir Happenings and bulletins from other branches to get ideas about additional activities

- Contact individual Activity Chairmen in other Branches for assistance in getting an activity started
- Follow up on new member interests as an opportunity to create a new activity
- In cases where the number of members interested in an activity are too few, see if an Area-wide activity can be started
- Ask your Area Governor to hold a meeting with all branch Activity Chairmen/Coordinators to brainstorm ideas for new activities
- Survey members for skills and hobbies they are willing to share with other members
- Consider joining together with other organizations such as senior centers to run joint activities

Training Leader's Note: You should be able to take a 10 minute break here.

Goal 3. ***Initiate at least 2 (more is better) new Branch activities for couples this year***

Potential group responses:

- Review the list of the 75 activities in Sir as found on the sirinc.org website to generate coed activity ideas
- Review Sir Happenings and bulletins from other branches to get ideas about additional coed activities
- Contact individual Activity Chairmen in other Branches for assistance in getting an activity started
- Review your branch current activities to see if there are any that could be converted or copied to coed (e.g. couples nine hole golf, couples bridge, etc.)
- Incentivize members to start activities
- Survey spouses and partners at Ladies' Day, and determine what additional coed activities they might be interested in
- Ensure spouses and partners are aware of current branch coed activities

3.2 Wrap up this portion of the training by asking, “How much better prepared are you to take on your branch activity role now?”

Note: The last three sections can either be done while the participants are in RAMP groups, or the participants can be led through the material as a combined group.

Section 4. SIR Leader Valued Behaviors (take about 15 minutes)

4.1. History (take about 5 minutes)

In January 2016, the Project 2016 team conducted eleven focus group meetings with 2015 Big Sirs or their alternates through out Northern California. The purpose of these meetings was to solicit answers to a number of questions raised by the written surveys conducted in October/November 2015. Among the questions asked was, “Recruiting the “right*” leaders is identified as the number one problem facing SIR. What can be done about it?” The following follow up question was then asked, “How would you define the right stuff?”

There was clear consensus regarding what valued behaviors were most desired. They

included enthusiasm, open mindedness, recognition, the ability to influence others, a reliance on consensus problem solving and decision making and having some knowledge of SIR and the tools necessary to do the job. These SIR leader valued behaviors were approved by the State Board in June, 2016.

You are critical leaders in your branch, and it is important for you to work on displaying these valued SIR leader behaviors. Remember, they are what others expect of you.

4.2. Where do you stand? A self-assessment (total time 10 minutes)

- **Handout A 4** SIR Leader Self-Assessment

4.2.1. The Valued Behaviors Defined:

Note that this form is titled “Self Assessment.” It is yours; it is up to you whether you wish to share it with anyone else. We think it will provide helpful guidelines as you conduct your recruiting job.

Take a look at the left hand column. Here the valued behaviors are described:

- Enthusiasm – Shows excitement and active interest
- Open Mindedness – Willing to try new things and open to ideas
- Recognition – Identifies, promotes and acknowledges excellent performance
- Influence Others – Brings others to his point of view
- Consensus Problem Solving and Decision Making – Involves others in solving problems and making decisions
- Knowledge of SIR – Understands SIR rules, Leader's Guide and RAMP

Note, the three columns to the right of the definitions provide example of the behaviors. Obviously, few of us will fill the Outstanding column, but it is something to work toward. Take the form home, check the boxes that seem to describe your leadership style then think to yourself, “Is this the way I want to lead the branch Recruiting function?”

Hopefully you will find it helpful.

Ask the following question: “Now, who has questions?” Respond to the questions.

5. Recruiting Volunteers (take about 30 minutes)

5.1 As we discussed earlier, you likely can't do all this alone.

Ask the group, “What are some advantages to involving others?”

Potential group responses:

- Shares the workload
- Gets different viewpoints
- Easier to recruit others as less individual time would have to be spent

- Others can think of additional recruiting techniques to try

5.2 What's the biggest problem with establishing a Branch Activity Coordinating Team?

- Getting volunteers

Let me share with you a foolproof way of getting volunteers on your team.

Let's start with things not to do:

- Expect that asking for volunteers will get candidates
- Got 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
- Be “people” driven rather than “position” driven. In other words, be up front and clear about the job you want the candidate to fill.
- Conduct a recruiting interview without thorough planning

5.3 How to be an effective recruiter for recruiting team members. **Recruit Through Relationships**

Frankly, the primary way things get done in SIR is through drawing on personal relationships and being prepared. It's a three step process – **Preparation, Contact, Discussion.**

How to do it:

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 the action plan materials we discussed in today's workshop
2. Review the list of Sir Leader Valued Behaviors. Ask the group: **“Which of those behaviors are particularly important for Activity Team members?”**

Potential Group Responses:

- > Enthusiasm
 - > Open mindedness
 - > Recognition
 - > Influence others
 - > 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:

Training Leader's Note: Ask the group for typical reasons for turn downs, then ask how they might counter them. Possible answers and solutions might include the following:

- 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.
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 are clear regarding the role you'll play 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 Activity Chairman for the branch. It's a critical role as we focus our efforts on building up our branch activities. Right now we have X activities and I'd like to grow the number by at least four this year 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.

6. Summary and Wrap Up (take about 15 minutes)

Ask the group the following questions:

- What did they think of today's training?
- How will they use it back at the branch?
- How could the training be improved?

Take notes of the group's responses, and email them to Mark Stuart (mss95678@hotmail.com) and Ed Benson (ebensonbwa@aol.com). We can use this input to improve our training efforts. Thank you.

Handout A 1

Job Description: Branch Activity Chairman/Coordinator Team Leader

Position Purpose: Guide the development and enhancement of branch activities to meet the Sir Mission Statement of enriching members' lives

Reports to: Big Sir

Principal Accountabilities:

- Chair the branch Activity Coordinating Committee
- *Serve as the voice of the activity chairmen to the BEC*
 - Maintain regular communications with activity chairmen
 - Identify and monitor activity chairmen needs
 - Conduct annual Chairman's breakfast meeting
 - Review the year's goals vs. accomplishments
 - Conduct open discussion of current issues
 - Reach consensus on following year goals
- *Generate activity development ideas for new activities from branch membership*
 - Work with interested SIR's in beginning new activities
 - Mentor new activity chairmen
 - Assist improvement of low performing activities
 - Recommend discontinuance of non-performing activities
 - Develop a 3-year branch activity plan for BEC approval with realistic and achievable goals
- *Monitor activity leadership succession and assist with succession planning*
 - Prepare annual succession analysis
 - Work with activity chairmen as needed to lower succession risk
- *Maintain current activity information postings*
 - Activity leadership roster
 - Alphabetical and a generic calendar of monthly events.
 - Co-Ed activities listing
- *Identify low performing activities, and assist with improvement actions*
- *Participate in BEC meeting*
 - Attend and participate in monthly BEC meetings
 - Prepare monthly activities report for the BEC
 - Recommend approval of new activities and deactivation when appropriate.
 - Maintain an Activity Book containing descriptions of all activities
 - Make activity announcements at Branch lunches
 - Participate in occasional Area leadership sessions
 - Apply all State SIR rules relating to activities

- *Work effectively with all involved parties* to ensure the position purpose is met.
- *Communicate the goals, plans and improvement actions of branch activities* to Branch XX members through personal contact and periodic Hotline articles.

Skills and Abilities Needed:

- Willingness to proactively promote new activity development
- Ability to use common email, document and spreadsheet software
- Successful experience as an Activity Chairman
- Ability to work well with a diverse membership
- Good oral and written communication skills
- Above average energy level
- Good organizer, with ability to focus ACC on major issues

Estimated additional time needed for this position beyond Sir membership:

About eight to ten hours a month for Email correspondence, phone calls, working with activity chairmen and the activity coordinating committee, occasional meetings and record keeping

Handout A 2

Activity 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.

Handout A 3

Activity Goal Worksheet

Goal 1. ***Institute a Branch Activities Coordinator and Committee to increase the range of member activities***

Goal 2. ***Begin four new activities this year***

Goal 3. ***Initiate at least 2 (more is better) new Branch activities for couples this year***

SIR Leader Self-Assessment

Leader Name: _____ Date: _____

What are your leadership valued behavioral strengths and opportunities?

Rating Level	Definition
1. Outstanding	Display of valued behaviors at this level is exactly what SIR needs
2. Acceptable	Display of valued behaviors is OK, but with focus can improve
3. Improvement Needed	Display of valued behaviors needs improvement

Category and Definition	1. Outstanding		2. Acceptable		3. Improvement Needed	
	Result	✓	Result	✓	Result	✓
Enthusiasm: Shows excitement and active interest	Eager; his enthusiasm is contagious. Seeks opportunities to show excitement, an optimist.		May show excitement over new ways of doing things. Solid supporter of RAMP elements and toolkit		Usually unenthusiastic, subdued, a pessimist. Grudgingly accepts RAMP	
Open Mindedness: Willing to try new things and be open to ideas	Gets excited over new ideas/improvements Seeks continuous improvement. Develops and implements new ways of doing things. Fosters, embraces and welcomes change		Can usually be counted on to implement improvement tools. Generally responsive and interested in new ideas and ways of doing things. Sets personal and organization stretch goals.		Grudging acceptance of new ways of doing things. Set in his ways. Resistant to change. Does not set stretch goals	
Recognition: Identifies, promotes and acknowledges excellent performance	Goes out of his way to recognize others. Adopts special recognition programs. Encourages and rewards top notch performance.		Recognizes others for good work. Coaches and mentors others. Shows gratitude for a job well done.		Has no special recognition programs other than those sponsored by SIR. Rarely acknowledges performance of others. Infrequently coaches.	
Influence Others: Brings others to his point of view	Anticipates the effects of his words/actions on others. Builds "behind the scenes" support		Appeals to reason, facts. Uses persuasion. Is diplomatic.		Slow to take action. Tends to let things just happen. Goes with the flow	
Consensus Problem Solving and Decision Making: Involves others in solving problems and decisions	Always involves others. Goes out of his way to include involved parties. Solutions are always well thought out.		Usually builds support to solve problems. Occasionally may not include all parties Solutions usually work.		Tends to establish solutions to problems without help of others. Presents solutions without building support	
Knowledge of SIR: Understands SIR rules, the leader's guide and RAMP Has computer skills	Understands all common SIR rules and follows the Leader's Guide and Schedule of Ops. Supports RAMP Has Excellent computer skills		Understands basic SIR rules and the Leader's Guide. Uses research before seeking help. Applies Understands RAMP Has necessary computer skills for job		Asks for help before doing any personal research. Has not reviewed SIR rules and Leader's Guide. Unclear about SIR rules. Poor computer skills	

Handout A 5

Recruiting Leaders and Team Members

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

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 the action plan materials we discussed in today's workshop
2. Review the list of Sir Leader Valued Behaviors. Ask the group: **“Which of those behaviors are particularly important for recruiters?”** (See SIR Leader Self Assessment).
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 and responses 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.
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 are clear regarding the role you'll play 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 (insert your role) for the branch. It's a critical role as we focus our efforts on (insert why the role is critical). Don't be afraid to utilize relevant statistics, For example here's one the Recruiting Team Leader might use... For the last three years we have lost approximately (enter branch loss percent) while gaining (enter new membership percent). 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 to the team 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?
5. **Wait for the answer!**
6. The candidate will either accept (great), or present objections to accepting.
7. 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 is does not accept the position, you should repeat the process with the number two prospect – who now becomes number one.