

Recruitment and Retention Tools for Branch Growth

SIR 2009 Annual Meeting, Vallejo

Based on the history of SIR, all of our branches have not fully shared our experiences with other retired men. In the first 40 years, SIR sponsored about 4 new branches per year. Our last charter for a new branch was given in 2003! Even if your branch has maintained membership, it has probably not reached out to all of those retirees who could enjoy our activities. The tested ideas in these pages should help your branch grow. Discuss them in focus groups.

The **Leadership Action Plan** has had good success in identifying areas of our branches where improvements in member rewards and retention can improve attraction to new recruits. Your Big and Little SIR can self assess these areas in your own branch. Then you can develop goals and use the ideas in this handout and those published in SIR Happenings for a branch improvement action plan. A self-assessment form is on page 7.

SIR Happenings is a source of good ideas from every branch, and published every quarter. Each of you now have a handful of printed copies of the May issue to take back to your BEC and to post on a SIR bulletin board for your members. You can have your BEC print out additional copies of past issues for a quarterly focus group discussion of what you can use in your branch.

In the following pages are areas of branch operations that you can review in your branch focus groups.

RECRUITMENT USING SIR Cards and SIR Brochures

Are you using SIR Cards for members?

Are you using SIR Brochures?

Have all of your members given one to their spouse for her friend's husband?

Are you joining other branches for Area Brochure Holders in public locations?

What is your conversion rate of guests to new members?

Do you have an Area Publicity & Recruitment person?

Do you have a Branch Recruitment Committee?

ACTIVITIES for Members

Is your branch mainly a single sport branch?

How many activities do you have?

How many couples' activities?

Do you have any Area activities?

Do you have a Branch Activities Coordinator?

MEMBERSHIP RELATIONS

Do you use the **Membership Program Implementation**?

How many new members are still with you after two years?

Do you interview your new members for satisfaction and suggestions after six months?

Do you have a New Member Relations Committee?

COMMITTEE VOLUNTEERS

To lead your committees, do you have a job or committee chair for each of your directors?

SELF-ASSESSMENT

Based on the dozens of replies to the LAP questionnaire, you can now review your own branch efforts in these three key areas. You can work with your Area Governor to set goals and actions in areas you want to improve.

SIR Branch Recruitment, Rewards and Retention Tools Catalog

These tools support the three guest-to-inductee-to-satisfied member steps:

1. Recruitment
2. Activities (Rewards)
3. New Member Relations (Retention)

Each branch should establish these committees to continue good practices for recruitment and retention of members.

You can improve recruitment of newly retired men with the SIR Brochures and SIR Cards. Then, once you have guests, what rewards do you have to convert them to members? And are you doing everything you can to see that your members are satisfied? The three functions work together to improve recruitment and member satisfaction.

This is a mini-catalog of membership tools. Ask us for full details of any item you want to use.

PART 1. TOOLS

Step I. Recruitment Tools

Many branches remain stable by Internal Recruiting--each member looking for friends or contacts. Internal Recruiting is natural but needs continuing support.

In talking with a number of branches, the most basic recruiting techniques are being reinvented repeatedly. (SIR Cards are an almost universal re-invention). A Big Sir retires, and a tool he used disappears. How can we keep good methods?

Recruitment should be institutionalized, with a standing committee and records, to prevent the loss of continuity. Good methods should be continued over many years, not just during one person's year of leadership service. A branch director should be chair or co-chair.

The Recruitment Committee also promotes External Recruiting. Each branch must work with other Area branches to recruit newly retired men by promotional efforts at Senior Centers, Golf Desks, and other organizations. Area coordination is necessary so a handful of branches do not compete with each other for bulletin board or brochure holder space. The

Area effort can be divided up among the branches, but presentations to area professional retiree groups, schools and women's organizations must be coordinated.

I.A. Internal Branch Recruitment

I.A.1. SIRinc.org Links

The State SIR website has good descriptions of Internal Recruiting in two places (Documents/Membership and Recruiting/Membership Program/Implementation at (<http://sirinc.org/>) and Raaka's Public Relations in the same area.

Use them as a foundation for good recruitment methods. Below are some additional methods and tools that will help.

I.A.2. SIR Cards \$38 for 1000

(Improved from Ideas that Work, Sir Gary Pelton, San Jose #10 provided the front invitation concept & Sir Dean Steichen, Walnut Creek #8 provided the activities concept.)

Sons-in-Retirement--Branch-8e

... We are retired men who enjoy our leisure time with friends and activities. We meet for lunch in Walnut Creek on the second Monday and would be pleased to have you join us. ...

My Name _____

My Phone Number _____

What do we do? We have a monthly meeting with a speaker. We have 9 & 18 hole Golf, Ladies Day Events, Fishing, Bridge, Pinochle, Poker, Travel, Hiking, Cooking, Investments, Computers & Technology, Digital Photography, Book Exchange, Pool, Bocce Ball, Walking, Live Theater, Explore and Eat, Wine Tasting, Astronomy, Singing, Bowling and more.

What don't we do? We have No Dues, Fund Raising, Political nor Religious Agendas. No Surprises.

Visit us at: <http://home.comcast.net/~sir8>

The back shows 20 potential activities, and if your branch doesn't have one, the new member can start it. Leave them in to start a discussion with a potential member.

1. During a luncheon, give 4 to every member—put several in their wallet and give several to their wives.
2. For every new member (not every guest), offer a free lunch to the sponsor (see 5 below).
3. Ask the Golf group to make a special effort to talk to every golfer they meet. Same with Fishing, etc.
4. Print one sheet of Avery personalized SIR Cards for new members in recognition of their joining. AND print a sheet for their sponsors. Or five for each on a sheet.
5. Print one sheet of personalized SIR Cards for every member that has brought two members in the past to recognize them at a luncheon meeting and encourage them to bring more. Give them a free lunch ticket, too.
6. Ask your members to bring a guest to an Activity even before they come to a luncheon. By enjoying an activity, they are more likely to become a member.

I.A.3. SIR Brochures (from G&M with help from Sir Richard Shapee, HLM Walnut Creek #8 & Sir Dwight Sales, HLM San Mateo #1)

The SIR Brochures are activity-oriented with the inside showing the 8 activities that most branches support. The back adds 15 more potential activities, and if your branch is missing a few, the new member can start a new activity.

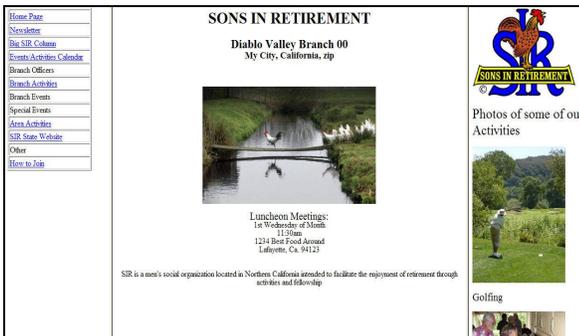
Have your members take a handful to their church meetings. And to their company retirement group. Bring back the unused ones.

Use them at your Ladies Day Luncheon or have your members take one home for their lady friends. Those ladies would like to get their husbands out of the house for a few hours.

Sir Clark Hime, Folsom #49, has used brochures to prospect within neighborhoods. He goes with another member, and they talk to a neighbor about who is retired in that area. Then they visit the retired person.

I.A.4. SIR Branch Website Template (from Sir Dean Steichen, Walnut Creek #8)

Many Branches do not have websites, and they have difficulty finding Webmaster experience volunteers. We have constructed a generic SIR Template that can be setup and maintained by members who have Word experience. The template is designed using Kompozer, a free web editor, from the SIRinc.org site Go to <http://sirbranch.com/> for Kompozer and a tutorial.



A demo version branch template is at www.sirinc.org/sirmodel/. Complete sets of generic template files to use with Kompozer are available on request. A tutorial is also available.

I.A.5. Branch Event on Internet

Making the public aware of SIR and individual branches are the purposes of listing your branch luncheons on the Internet. To see a sample, Google "SIR 8 Sons In Retirement." This event appears both on SFGate.com and ContraCostaTimes.com. Choose the ContraCostaTimes listing.



Instructions for your own event listing are at SIRinc.org> Documents> Membership> Public Relations

I.A.6. SIR 1.0 What Do We Do? (from Sir Richard Shapee, HLM Walnut Creek #8)

Paralleling the new SIR Brochure, a new PowerPoint presentation is available for use when presenting to other organizations. Branches should add this to their website. An example is at <http://branch8.sirinc.org/> just click on Membership, then on "What is it like to be a member?"



I.B. External Area Recruitment

(from Sir Harry Hubinger, Walnut Creek #8)

I.B.1 Area Brochure Holders

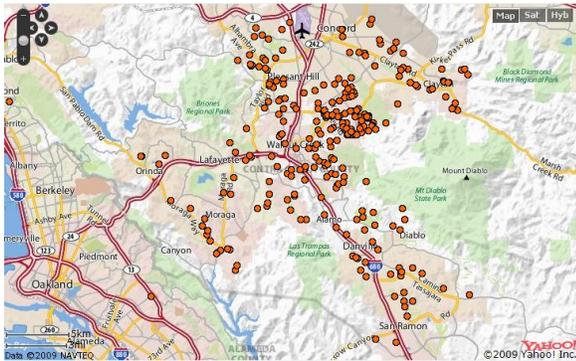
These are compact holders to save space on Golf Course desks. Some Senior Centers have brochure racks, so the holder may not be needed.

I.B.2. Area Organizations

Our list includes professional societies and companies as well as Golf Courses, etc.

I.B.3. Branch Member Map (from Sir Derek Southern, Walnut Creek Branch 8)

Developed as an aid for ride sharing, we will use this on our website. An Area Branch Map will be used in our Recruiting and Orientation PowerPoint.



I.C. Branch Recruitment Committee

Objectives:

To publicize SIR and recruit new members with emphasis on publicity to newly retired men by improving Internal Recruitment and External Recruitment.

Internal Recruitment provides tools to individual members for person-to-person guest recruitment.

- SIR Cards should be available to every member to carry in their wallets. These are generic with blanks to write in member names and phone numbers.
- Brochures with branch contact information are available to members for mailing with their cards or taking to their churches or other personal organizations.
- The publicity chair would inform local papers of individual Sir achievements and of branch events of local interest.

External Recruitment cooperates with other Area Branches to promote SIR in other local organizations. This is to prevent organizations banning competing branches.

I.D. Area Publicity and Recruitment Chair (as an aide to Area Governor)

Objectives:

The Area Publicity & Recruitment person is to coordinate the external recruitment of branches in the Area, to support internal recruitment within branches, and

to encourage local publicity of outstanding SIR members. The Area Publicity & Recruitment Chair is appointed annually by, and works with the Area Governor. He has no budget and no authority.

Step II. Activity Tools (The number of activities indicates a vibrant branch. Growth in Activities will improve any level of branch vitality. Reward your members with more activity choices.)

We have a known list of 75 SIR Activities in five areas: Sports, Educational, Fitness, Social and Couples. A healthy branch plan aims for at least 10 branch activities, in addition to State and Area activities for a total of 20 or more. To do this, an Activity Coordinator is very useful and necessary. It is easy to add couples activities.

II.A.1. Area Activities Poll

Polling each of the branches in an area serves to stimulate each to look at their own efforts to increase the membership experience. SIR has 75 activities available.

Devoted to the promotion of independence and the dignity of

Our purpose is to engage men to joint our activities and make new friends. Some of our activities include Fishing, and are also AREA AND STATEWIDE, so our circle of friendships is wide and include guests and COUPLES.

Activity	Br	Br	Br	Br
Antique Cars	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Astronomy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Backgammon	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Band	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Barbecue-Couples	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Barbershop-Quartet	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Baseball-Day-Couples-State	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Basketball-Day-Couples-State	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Beer-Tasting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Biking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Book-Club	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

II.A.2. Area Activities

In addition to the common Area activities of Bowling, Pool, Fishing, Computers, Investments, encourage other branches to list your activities where you have space. Other Sirs can attend as visitors until they build up sufficiently for their branch. If an activity has two or three interested in your branch, publicize it to the other branches to form an Area activity. Coins or stamps or bicycling may be candidates.

II.A.3. Branch Activities Questionnaire and Application

The Membership application has a blank back page. List your activities, including State and Area in the top section for easy check-off of interests. Then list the other 50 potential activities for easy check off.

II.A.4. Posters for Activities

Image posters to promote Activities can be ordered online from Costco for tables at the luncheon sign-in area. Glue them on poster board to add color to your luncheon sign-in area. This social activity has from 40 to 60 at each Dine-O-Sir outing. (from Sir Phil Goff, Walnut Creek #116)



II.B. Branch Activities Coordinator

Objectives:

Coordinate branch activities for maximum participation within the membership. Encourage scheduling for least interference with other SIR activities. Encourage participation through Hotline articles, Monthly Luncheon Meeting announcements and while attending branch activities.

Step III. New Member Relations

(from Sir Peter Gates, Pleasant Hill #146)

Repeatedly, we hear of sad recitals where a new member was left to himself, got dissatisfied and resigned. In Branch 8, we get 50% new members from all guests. In addition, we lose 20% of the new members within two years. 100 guests = 40 new members that stay.

New members should be tenderly cared for, and especially the unsponsored guest.

New Member Relations should be institutionalized, with a standing committee and records, to prevent the loss of continuity. Here are some additional tools.

Such a committee can review the entire Guest-Luncheon-Application-Orientation-Inductee-Hand Holding process. Every six months, a new member

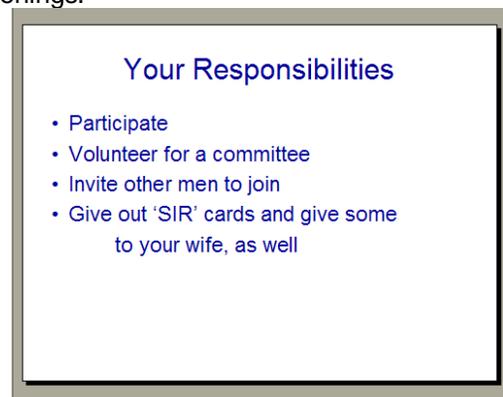
focus meeting can be held to hear of gripes and accolades and new ideas.

III.A. Orientation

Orienteing new members has been a solid part of the SIR Membership Program. Here are some tools to help:

III.A.1 Orientation PowerPoint (from Sir Stan Barkey, Mountain View #35, updated by Sir Richard Shappee, HLM Walnut Creek #8)

This follows the Membership Program Implementation Document on the SIRinc website. This is a 35 slide PowerPoint used in new inductee orientation. More detail is in the February 2009 SIR happenings.



III.A.2 Sponsors and Buddies

The NMRC of Branch 8 is polling all present and past BEC members to create a volunteer list for aiding unsponsored guests. We are also considering assigning a Buddy to all new members in addition to the Sponsor.

III.A.3. New Inductee/Sponsor Table

A table is reserved for the new inductees and their sponsors each month. We are considering this for two months, so a new inductee will be able to meet their immediate predecessors.

III.A.4. New Member SIR Card

As recognition of their membership, and as part of their induction package, we are printing ten cards with their name and phone number. We also include a blank application form.

III.A.5 Six Months NMRC review

Every six months, we invite the new members to meet in a round table discussion about their

experiences and suggestions for improving the Branch.

III.B. New Member Relations Committee

Objectives:

To improve, communicate and monitor the orientation and integration of new members from the point of their being a guest until they have completed six months of active membership.

Goals are to improve the guest's first-time experience, to improve guest to member conversion ratios, to reduce the turnover of new members.

Part 2: Sample Branch Action Plan with Three Committees

We will create a Recruitment Committee with a Director as Chair or Co-Chair to solicit membership suggestions for publicity to newly retired men, implement them, and report on the ongoing success of each method. Calling cards and tri-fold brochures are aids we will try. We will appoint a member to work with the Area recruitment effort.

We will encourage members to bring guests, by giving the sponsor a lunch ticket and a page of personalized SIR cards when the guest becomes a member. We will honor two past sponsors who have brought in two members or more at each luncheon. Other incentives might be tried.

We will create a New Member Relations Committee with a Director as Chair or Co-Chair to solicit membership suggestions for improving the first-time guest experience, for orienting new members and directing them to activities, and interviewing new members after six months for improvement suggestions.

We will solicit suggestions for improving the membership experience of our existing activities.

We will create an Activity Committee with a Director as Coordinator or Co-Coordinator to encourage trials of new activities to improve the experience of our members. We will try 1 new activity each quarter to enhance our membership experience. We will encourage small numbers of members with an activity interest to work with other branches for an Area activity.

Part 3. Big & Little Sir Training

(from Sir Dean Steichen, Walnut Creek #8)

This is a power point developed for the 2008 Leadership Training in Area 2. Slide ten covers the intent of all three of the TriFunctions.



As an aid to increase Area Vitality, we have encouraged volunteers like Editors, Webmasters, Activity Coordinators, NMRC Chairs to meet at least once a year for exchange of ideas and practices.

Part 4. Sources

SIR Card Printing, www.digitalroom.com
SIR Brochures from SIR Directors

SIR Brochure Holders, TAP Plastics #46801 4" Wall Holder, \$1.75

SIR Card Holders, TAP Plastics #BP50C, 46893 \$0.75

Use labels, not stamps—they smear. Labels, 2 3/4 x 2 3/4 for Area Brochures and Card Holders, Avery 8196 Diskette, Fry.com \$14.99 for 225. Or Labelsonline.com, \$10.95 for 600; or 2.3 x 3.37, like Avery 5395, LabelsOnline.com, 1000 for \$10.95

Blank Business Cards, for Inductee Personal Cards, Avery 8371 Fry.com \$9.99/for 250; and Misterinkjet.com \$6.00 for 250

This is a just a mini-catalog of membership tools. Ask us for full details of any item you want to use. We also welcome additions and suggestions.

Sir Branch Assessment

Branch: _____ Location: _____

Big Sir: _____

Little Sir: _____

Area Governor: _____

Circle the score that best represents your branch's level of achievement & add them

Category	Level 1		Level 2		Level 3	
	Result	Score	Result	Score	Result	Score
1. Trend in net branch membership from Form 28 – 12/31/07 to 12/31/08	No gain, or lost membership	0	Net gain between 0.1% and 2.99%	30	Net gain 3.0% or more	60
2. Average age of branch members?	78 years and above	10	Between 76 and below 78	20	Under 76	30
3. Percent of branch membership under age 70?	Under 15%	20	Between 15% and 20%	40	Over 20%	60
4. Number of branch-specific activities? (See note 1)	4 or less	20	Between 5 and 9	40	10 or more	60
5. Average annualized percent of members attending regular luncheon meetings (See note 2)	Less than 60%	10	Between 60% and 70%	20	Over 70%	30
6. Does branch have difficulty filling officer and BEC positions?	Yes to any position	10	Sometimes to any position	20	No to all	30
7. How does branch recruit new members?	Relies solely on current member referrals	10	Reward members for recruiting, use branch brochures, Sir cards	20	Uses methods beyond member referrals/reward; Recruitment Committee; website linked to state	30
Your branch's total score:						

Note 1. Exclude state, region, area and ladies day/holiday events from your count

Note 2. Exclude ladies day/holiday events from calculation

Score Range	Branch Health
80 to 139 Points	Potential branch failure unless dramatic change is undertaken
140 to 239 Points	Potential problem areas identified that should be addressed to improve branch vitality
240 to 300 Points	Problems identified are relatively minor – stay the course

SELECT YOUR POTENTIAL BRANCH ACTIVITIES

Our purpose is to provide members a choice of activities to enjoy and make new friends.. Some of our activities such as Golf and Fishing are also **AREA AND STATEWIDE**, so our circle of friendships is widened. Many of our activities include guests and *COUPLES*. If there are only a few Branch members interested, you can join with nearby Branches to create a larger Area activity. Please suggest new hobbies and activities.

Please check off the activities you are interested in or have experience in. We will have the Chairs call you.

Bold Activities are Area & State as well as Branch. *Italic Activities include Couples.*

<i>Baseball Day State <u>Couples</u></i>		<i>Football State <u>Couples</u></i>	
<i>Basketball Day State <u>Couples</u></i>		<i>Golf 18-Hole State</i>	
<i>Bocce Ball Area <u>Couples</u></i>		<i>Golf 3-day Overnight State <u>Couples</u></i>	
Bowling, Lane Area		Golf Home to Home Area	
Bridge Duplicate Area		Investment Area	
Bridge Rubber Area		<i>Jazz Sacramento State <u>Couples</u></i>	
<i>Computers & Tech Area <u>Couples</u></i>		Pool-Billiards Area	
Digital Photography Area		<i>Racing Day State <u>Couples</u></i>	
Fishing Area		<i>Travel State <u>Couples</u></i>	
Astronomy		<i>Game Night <u>Couples</u></i>	
Backgammon		Gardening	
Band		Gin Rummy	
<i>Barbecue <u>Couples</u></i>		<i>Golf 9-Hole <u>Couples</u></i>	
Barbershop Quartet		Guys Dine Out	
Beer Tasting		Harmonica	
Biking		Hearts	
Book Club		<i>Hikers <u>Couples</u></i>	
Book Swap		Historical Interest	
Bowling, Lawn		Horseshoes	
Breakfast Club		<i>Ladies Day <u>Couples</u></i>	
Brewing		<i>Let's Dine In <u>Couples</u></i>	
<i>Bridge <u>Couples</u></i>		<i>Let's Dine Out <u>Couples</u></i>	
Bridge Duplicate		Model Railroad	
Bridge Rubber		Newsletter Makeup	
<i>Bridge Traveling <u>Couples</u></i>		Pickle Ball	
		Pinochle	
Chess		Poker	
Chorus		Stamps	
Coins		Tennis	
Cooking Group Share		<i>Theatre <u>Couples</u></i>	
Cooking One Man Host		<i>Walkers <u>Couples</u></i>	
Crab Feed		Website	
Cribbage		<i>Wine Finders <u>Couples</u></i>	
<i>Dancing <u>Couples</u></i>		<i>Wine Tasting <u>Couples</u></i>	
<i>Dinner-Dances <u>Couples</u></i>		Woodworking	
Dominoes		Writing Your Biography	
<i>Explore & Eat <u>Couples</u></i>		Veterans	