



SIR Branch 8 Handbook for New Chairmen

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WELCOME!

As a valued, contributing member of SIR Branch 8 and as a leader, you are demonstrating your interest in adding to the excellent reputation of Branch 8. Chairman of an activity is a vital position in Branch 8. As a chairman, you will have all of Branch 8's tools and management resources at your disposal.

COMMUNICATION

Activity Chairmen for new activities should immediately talk with:

1. Branch 8 Activity Coordinator (AC). The current AC is listed at the end of the latest edition of the Hotline branch newsletter in the "Mt. Diablo Branch No. 8" chart under "Branch Positions". <http://www.sirbr8.com/hotline/>
2. Hotline coordinator*
3. Web master*
4. AMS Coordinator*
5. Hilton Coordinator if an activity table is desired before the Branch 8 luncheon.*

6. New Chairman Advisor*

* See details in the Available Resources section

As the new activity is organized, the chairman should meet with interested participants to outline what he pictures the activity to look like and starts an interactive discussion to insure that all participants agree on the goals of the activity, meeting structure, and dates for activities.

Ongoing, the activity chairman should make announcements and promote the activity at every opportunity. He should be creative and use every resource available to publicize his Activity (see Available Resources section). Work is required.

NEW ACTIVITY

There are several Branch 8 tools that will helpful to you in chairing your new activity. These include:

- creating newsletter articles (Hotline),
- maintaining your activity page on the Branch 8 WEB site, and
- maintaining AMS (Activity Management System, your on-line activity membership records).

Up-dates to these tools are easy to prepare and training in how to do them will be provided (see Available Resources below). It is important to acquire one or more Assistant Chairmen to help with planning and execution of your activity program after you get started.

Your initial contact should be with the Activity Coordinator – you will find his name by going to the end of the latest edition of the Hotline Branch 8 newsletter - look in the “Mt. Diablo Branch No. 8” chart under “Branch Positions”. <http://www.sirbr8.com/hotline/>. Most everything you will need to know about SIR's can be found

- ❖ on the Branch 8 WEB site (<https://www.sirbr8.com/>) and
- ❖ in the monthly Hotline newsletter.

See the "Available Resources" section in this handbook for additional details.

Describe your proposed activity to the Activity Coordinator to see if it meets the qualification criteria of the SIR Organization, including insurance coverage of the activity. Most activities will. The Activity Coordinator will handle getting Branch Executive Committee (BEC) approval for your new activity.

You can then get some assistance from the Activity Coordinator in

- ✓ setting up a general E-Mail notification of your activity,
- ✓ obtaining luncheon interest cards,
- ✓ getting an announcement for the branch monthly luncheon or a luncheon lobby table to advise the branch membership of your plan to start the new activity. You can make an announcement yourself or ask the Activity Coordinator to announce it at a monthly luncheon in order to encourage members to join in the fun.

- ✓ the Activity Coordinator will also assign a "new Chairman Advisor" to help you get started. (See AVAILABLE RESOURCES below.) The Advisor will be a sounding board and help guide you through the early stages of "getting started."

Once you have responses from interested members, contact them and set up a "1st meeting". "SET UP MEETING AND MAKE AN AGENDA" section of this handbook will be helpful.

TAKING OVER RESPONSIBILITY FOR AN EXISTING ACTIVITY

If you are moving up from an Assistant Chairman position or assuming the Activity Chairman's position of an Existing Activity, the path is somewhat the same. You must learn how to use the Activity Management System (AMS) and who to contact to submit your monthly activity piece to the Hotline newsletter. The Branch 8 Website's Activity page is an important tool to let all the branch members, as well as members of your Activity know what is happening and when. If you want to change or modify the current Activity meeting practices, the "SET UP MEETING AND MAKE AN AGENDA" section of this handbook will be helpful.

In most cases the transition in leadership will be smooth and simple. If you are a new member of the Activity, and are becoming the new Activity Chairman, select an Assistant Chairman as quickly as possible to help assure the continued success of the Activity. Other Activity members will also be there to help you along as you take over leadership. You can also get a "new chairman Advisor" to help you get started. See the "AVAILABLE RESOURCES" section of this Handbook for additional contact/functional information.

SET UP A MEETING AND MAKE AN AGENDA

After you have identified Activity participants you will set up your first meeting.

Once you know the number of participants, select a venue. You must consider:

- Number of participants. Number of seats needed.
- Location with respect to where participants will be coming from.
- Meeting day of week and time of day – consider traffic and participant schedules, including conflicts with other SIR activities your participants may be involved with.
- Equipment you may need for the meeting (e.g. digital projector and screen (which may be a blank wall) or large screen TV you can connect your laptop to).
- Whether you want to offer snacks and drinks or lunch (no host).
- Expected length of the meeting (usually no more than 2 hours)
- Cost of the meeting room. There are several venues that are no cost:
 - Your or another participant's home (especially good if the home has a large screen TV you can connect your laptop to, if you need it).

- There are several public libraries that offer meeting rooms at no charge
- A private room in a restaurant that might be free if your group is having lunch there.
- The Branch 8 luncheon facility after the monthly branch luncheon. Contact the Branch 8 Attendance Secretary (the current secretary is listed in the Membership Roster under “Mt Diablo Branch 8 Officers”) to reserve a no-cost after lunch table.

WARNING! The most difficult task (and most frustrating) is setting a date and time for the first meeting and getting people to come. For a bunch of retired folk, we sure are busy little critters! You may feel you are trying to herd cats!

- The primary concern, especially for a new Activity, is to maximize participation.
 - You will probably identify initial participants verbally. Don't rely on a simple verbal commitment. Follow up with an email and get a response by email. Give participants frequent “status” reports. Perhaps ask a question to elicit a response. The objective is to keep reminding them of the meeting and gaining their commitment.
 - The Activity graveyard is littered with bones of attempted new Activities that held a first meeting and few or even none of the identified interested people showed up.
 - From your conversations with interested people select several target dates and times (morning or afternoon) for the first meeting. Send this to all potential participants via email. A phone call reminder may be helpful. Realize it may be impossible to get 100% participation, even with a small group.
 - Develop a spreadsheet or chart showing who is available when.
 - Contact any potential participants who cannot make the meeting to let them know why you selected that date and follow up with the results of the meeting to keep them committed.
- Send out a meeting reminder a couple days before the meeting.

Prepare a meeting agenda and distribute it prior to the meeting. Consider using PowerPoint slides, pictures, and other tools to facilitate the meeting. Include:

- Meeting location and time. Include directions to the meeting site and parking availability and cost.
- Select a note-taker to help you be sure the meeting discussion and decisions are documented correctly
- Define the Activity to get buy-in.
- Set goals.
- Select meeting days, times and frequency. Use the Monthly Calendar on the branch Website (see “Calendar” on the menu bar at <https://www.sirbr8.com/>) as a reference to discuss conflicts with other SIR Activities and events.
- Discuss the use you want to make of your Branch 8 Website’s Activity page, the Hotline, and AMS (Activity Management System).
- If it hasn’t been done already, you should discuss responsibilities of an Assistant Chairman, select him and get his commitment.

- Summarize the meeting results. Be sure all important points are covered clearly in notes of the meeting – make no assumptions. Be sure all participants are clear about what they need to do next and buy into that. Send your notes of the meeting to all participants.
- Set a time and place for the next meeting or first event. Set a draft agenda for that meeting or event.

Go home and have a drink!

AVAILABLE RESOURCES

There are several tools posted on the SIR Branch 8 Web site homepage in the drop down menu of the “Activity Admin. & Tools” tab (<https://www.sirbr8.com/>). They are:

- Activity Chairman Handbook
- AMS
- Communication Guidelines
- Chairman Advisor Program
- Activities Calendar
- Fellowship Best Practices
- Meeting Venues List
- Activity Chairman and Co-Ed Activities List
- Activity Coordinating Committee (ACC)

More Resources:

- Activity Coordinator. As a new activity chairman, you have a lot of responsibilities and the branch wants to assist you in establishing a viable and thriving activity. Your primary resource will be the Activity Coordinator and the Activity Coordinating Committee (ACC), a group of experienced activity chairmen who are always willing to help. The Activity Coordinator and ACC members are listed at the end of the latest edition of the Hotline branch newsletter in the “Mt. Diablo Branch No. 8” chart under “Branch Positions”. <http://www.sirbr8.com/hotline/>
- Talk with the Members. You will be able to get useful input and assistance from the members who have expressed interest in your activity and these leads should be explored fully. In order for the activity to progress, your first order of business should be to appoint an assistant chair who is as committed to the activity success as are you and can help promote and recruit members.
- Email Blast. To get word of the activity out to all members of the branch the first communication with the membership should be an “e-mail blast” to all members with an e-mail address (virtually everyone) describing the activity, its goals and highlights. This should be given to the Branch 8 E-Mail Distribution manager, with any relevant instructions such as preferred dates etc., for sending out to the membership. (See at the end of the latest edition of the Hotline branch newsletter in the “Mt. Diablo Branch No. 8” chart - under “Membership Positions” “Email Distribution”.) After allowing a reasonable time for responses, another blast

may be appropriate lauding the response and further extolling the activity. Note the blasts can be published on the Website if required.

- Website Posting. The website editors should be alerted to the new activity and a description and contact information should be submitted to the Webmaster for publishing (the Webmaster contact information is in the “Mt. Diablo Branch No. 8” chart, under “Technology Positions”. (Note that each Activity may have its own Website editor to make the posting to your Activity page on the branch 8 website. For training of a Website editor for your activity, talk to the branch Webmaster.) Unlike the Hotline, information sent for the website is usually published a few days after receipt and usually without a size limit. You should also request an entry be set up for your new activity in the “Activities” list on the right column on Branch 8 Website at <http://www.sirbr8.com/>.
- Hotline. An article suitable for inclusion in the next Hotline should be drawn up, again extolling the activity and encouraging people to express interest by replying to the e-mail addresses and telephone numbers in the Hotline under your Activity. Articles for inclusion in the Hotline must be submitted no later than the 19th of the month preceding the publication month and addressed to Hotline@sirinc3.org . Please note the suggestions (and in some cases requirements) for formatting Hotline articles as listed in the current version of the Hotline.
- New Chairman Advisor. The branch also has a “New Chairman Advisor” to help the new activity learn from the Advisor’s experiences. The New Chairman Advisor can help the new activity chairman develop a plan to kick-off an activity (see “SET UP A MEETING AND MAKE AN AGENDA” above) and help you obtain any resources required. Contact the Branch 8 Activity Coordinator to have an Advisor assigned. (The current Activity Coordinator can be found in the “Mt. Diablo Branch No. 8” chart under “Branch Positions” at the end of the Hotline monthly newsletter. <http://www.sirbr8.com/hotline/>)
- Use AMS. The AMS (Activity Management System), a membership database, is also available and can be accessed from the Branch 8 website menu ‘Activity Admin & Tools’ > ‘Tools for Activity Chairmen’. AMS is a useful and convenient tool, a source of always accurate membership information. The AMS QuickStart Guide and Activity Chair User Guide can be accessed at <http://www.sirbr8.com/activity-management-system-ams/>. For AMS training talk to the AMS Coordinator through the Activity Coordinator (see the COMMUNICATION section).
- The Importance of an Assistant Chairman. You will do yourself and your membership a huge favor by giving proper time and consideration towards choosing an Assistant Chairman carefully.
 - ✓ Is he enthusiastic?
 - ✓ Does he own a Computer?
 - ✓ Is he proficient with word processing?
 - ✓ Is he proficient with spreadsheets?
 - ✓ Can he print at home?
 - ✓ Will he put in time to help you in your meetings and activity functions, take over for you when you are not there?

Discuss these assistant qualifiers with potential assistant chairmen to get agreement, rather than simply accepting an "OK". If you have a choice of assistant chairmen, interview each one. Make sure they know that you appreciate their offer to team up with you.

When holding a meeting, ask the assistant chairman to take notes; discuss details with him afterwards - are you on the same page? It may be helpful for you to be together at meetings or activity events.

RECRUITMENT

Unless you are extremely lucky in your leadership role as Activity Chairman; unless your activity is a natural magnet such as Golf, Fishing or Bar- B- Que, you must continue to work on two the two R's: Recruitment and Replenishment.

This works best when you plan for it. Do not rely on the initial sign ups to stay. It is a given, that a significant percentage of initial members will drop out during the first three meetings - or sooner. So, be prepared. Get out there and talk it up.

- Communicate with your members in person (best), by telephone (2nd best), and e-mails (3rd best).
- In recruitment for replenishment, do not overlook your friends and neighbors and new people you meet, a common, yet solvable mistake
- Work the SIRS Farmers Markets in Spring and Summer.
- Always look for like-minded people, ones who you know and you feel would enjoy your activity. Let them know how much fun you have because you joined Branch 8. People you sponsor are near automatic for joining your activity.
- Lastly, however importantly, have your Assistant or Co Chair do the same thing.