



Thoughts from President Southern

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February
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Well, it's still February but March is creeping up on us, so here are a few thoughts about 'Things to Be Doing'. I want to keep the State newsletter **'Happenings'** **focused on news about our branches, so my messages will focus on administrative stuff**. We encourage you to submit Happenings articles about your fun activities, travel opportunities, facts about special members, especially Veterans and for your ideas about bringing in more guests and converting them to long-term members—in fact, anything you'd like the rest of us to know about what makes your branch special. Please ask your members to call me with questions or suggestions or write to **HappeningsEditor@gmail.com**

My thanks to editors and others who have sent me copies of your branch newsletter, please continue to do so. If I'm not on your mailing list, please add me as I enjoy reading your news.

The first **State Board Meeting** of 2018 was held on January 19 at Manteca Golf Club. The minutes have been posted on the State website at <http://sirinc.org/MemInfo/statemeetings/> .

Have you wondered how to make really good visuals in Excel? If you go to <https://www.myonlinetraininghub.com/visualizing-parts-to-a-whole-in-excel-charts> I believe you'll find some new ideas. I know I did!

Mark this date on your calendar:

Big Sir Meeting, Monday March 26, 10 am — 2 pm

All Big Sirs, Area Governors, and Regional Directors are invited to a meeting on Monday, March 26 that will be held at a Rossmoor facility in Walnut Creek. In recent years the only time all Big Sirs got together was at the Annual Meeting in August, but any benefits from meeting other Big Sirs and sharing ideas were then too late in the year to be useful.

After our very successful GoToMeeting session with 23 Regional Directors, Area Governors and some Board Members, Jim Johnson, Area 5 Governor sent the following message to his Big Sirs:

"It is my understanding some of you aren't aware of a great opportunity for you to meet and chat with the SIR State President Derek Southern. He wants to hear from the Big Sirs and talk with you about things that are on your minds in the SIR trenches. It gets even better, he is even going to provide lunch. Better yet, he wants the Big Sirs to set the agenda items on what you want to talk about." I can't improve on that message so I'm posting it with my thanks to Jim.

I'm sure some of the topics will include: State budget for 2018, Rule changes, Training, Annual Meeting and 60th Anniversary, Leaders Guide, Direct emailing to members, State website, Using current report forms, Insurance coverage and more. The main idea is to listen to Big Sirs, not to lecture at them! If you ask questions that cannot be answered at the meeting I will take them away and get the best answers possible and report them in the next available President's letter. Let me know what questions you want answered.

A meeting room is booked at Rossmoor but we are still determining which one it should be!

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Reminders from the Branch Schedule of Operations

Please share this information with all your BEC members

Form 27 is an essential tool for managing your Branch. Please ensure that copies are sent to all the distribution list and be sure to discuss your 2018 goals, and progress towards meeting them, at each BEC meeting.

Big Sirs: The audit report is due in February so time is precious. Please encourage Little Sir to understand the audit process and understand why the questions are asked. You can ignore the "Error Omission" instructions from the Insurance Committee as the process has been changed. Also start considering any Branch Byelaw changes that may be required.

Little Sirs: This month you should review the Audit process and prepare to review Form 28 as your March task.

Secretary: This month please send (or have someone else send) a copy of your **Branch Roster** to Dwight Sale (dwight.sale@comcast.net).

The IRS requires a copy of each Branch's Roster to be on-file. The copy can be an Excel spreadsheet, a Word or other text document, or a printed version – please send it as soon as possible. Also send copies to your Area Governor and Regional Director.

Treasurer: The monthly Form 28 for January was due to the Assistant Treasurer by February 10. If this form is late the Asst Secretary needs to follow up so please help him out by being on-time every month. He will thank you.

Other: Your Nominating Committee will be reporting progress to the BEC in March, a reminder now might be useful!

Sample messages from branch newsletters: good reminders

Branch 109 (62 members) Big Sir message - Sir Ron McCarty I would like to wish everyone a happy Valentine's Day. Just a few reminders as we will need a Big Sir and Little Sir for next year, so please give it a consideration and give your name to the nominating committee. If you would like to help with manning a table to get new members in the future please give your name to Pascual Perez. It is very important to keep our club active with new members. See at the next meeting/ luncheon.

Branch 37 (152 members) Big Sir message - Bill Gray This year is the 60th anniversary of Sons in Retirement. It was started on July 23, 1958 in San Mateo by nine founding members. Every year the state organization has an Annual Meeting in August that is attended by all Big Sirs. This year, in honor of the anniversary, they would like to do something special. They are planning a three day event at Thunder Valley Resort and Casino in Lincoln on August 6 – 8 and most of the events will be open to all Sirs. The tentative plan is to have a golf challenge and no host dinner, open to all Sirs, on Monday, August 6. The Annual Meeting, for Big Sirs and Little Sirs only, will be on Tuesday, August 7. And then there will be more activities for all Sirs on Wednesday, August 8, such as golf, bowling, and bocce ball.

We are lucky because we are close enough to make it a day trip. Nothing is firm yet, but pencil in those dates on your calendar. I will pass on more information as it becomes available.

Here's a simple Form 27 question which lead to complications! Please follow along through question 3 and you'll learn about the logic employed in the Form and how the results can lead to fundamental thoughts about a branch's goal setting!

Question 1: When can we expect an updated Form 27 on the SIRs' website so reports starting Jan 2018 can be completed?

Answer 1: We don't change Form 27 each year! The form on the website at <http://sirinc.org/sirforms/> is blank so it can be used for several years 'as is'. Once you have downloaded a new Form 27, enter the year in the box at the top (circled in red in the figure below). That results in the 3 previous years (2015-2017) being entered in 2 places (blue boxes). A few other cells receive values which will change as you enter branch specific data. Finally, add the month by clicking on the little arrow to the right of the Month box (highlighted in green and red). This has set-up the Form for use by any branch, so add the needed information to identify your specific branch in the empty boxes in the top row. I did exactly what I've written above and captured the attached screenshot to illustrate the set-up.

Form027_XL_20160101.xlsx - Compatibility Mode - Excel

File Home Insert Page Layout Formulas Data Review View Tell me what you want to do

Clipboard Font Alignment Number Styles Cells

AutoSave OFF

R3 : X ✓ fx JAN

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z AA AB AC

FORM 27 - MONTHLY BRANCH MEMBERSHIP REPORT

Blue cells are calculated fields: passworded and locked.

Year **2018** Report Month **JAN** Region Area Branch

		Previous Years															Year Total	Year %	Min Goal	Branch Goal
Line	Description	2015	2016	2017	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec				
1	ACTIVE MEMBERS LAST MONTH (= Line 4 last month)				0															
2	NUMBER OF MEMBERS IN																0		1	
3	NUMBER OF MEMBERS OUT (ATTRITION)																0			
4	NUMBER OF ACTIVE MEMBERS (Lines 1+2-3)				0														1	
5	TOTAL NUMBER OF ACTIVITIES - including couples																			
6	NUMBER OF COUPLES ACTIVITIES																			
7	MEDIAN BRANCH AGE (Active Members)																			

Line 2 Minimum Goal- Process: review Line 3 Attrition for the past 3 years. Estimate attrition by current year-end. Add +1 gain (or other desired gain) to this estimate= Line 2 Goal. THIS IS A KEY GOAL FOR YOUR BRANCH

Line 4 Goal- Process: Add +1 gain (or other desired gain) to Line 4's prior year-end actual= Line 4 Goal.

Membership change this year **0**

LUNCHEON ATTENDANCE

Enter "LDL" above Ladies B...

Line	Description	2015	2016	2017	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year Total	Year %	Min Goal	Branch Goal
8	ACTIVE BRANCH MEMBERS IN ATTENDANCE																			
9	PERCENT OF ACTIVE MEMBERS IN ATTENDANCE																		70%	
10	GUESTS (Guests are potential members only)																0		0	

Question 2: Everything worked as you suggested; however, my concern is Line 10, Min Goal. For the last 3 years (2015 - 2017) we averaged 12.6 guests, yet the formula calculates our minimum goal for 2018 is 61 guests. Ain't gonna happen.

Answer 2: There are several steps leading to the value of 61 guests needed, which I agree is highly unlikely! Using the data on your Form 27 (not shown here) submitted with the question:

1. The Minimum goal of 87 members by end of 2018 is simply (year-end 2017 membership +1). All branches have a goal of at least +1
2. Your attrition in 2017 was 21, so your minimum Number of New Members IN goal should be (attrition + 1 = 22); unless 2017 attrition was unusually high
3. You had 4 new members in 2017, and reported 11 guests attending lunch. This means you needed 2.8 guests to add 1 each new member.
4. To reach your goal of 22 members IN, you therefore need $22 \times 2.8 = 61$ guests.

That's how the report is set up to calculate the goals using the previous year's data.

So what can your branch do to reduce the 'impossible' guest target? I would first ask if 2017 was a 'normal' year as it's the basis for the spreadsheet calculations. The goal calculations are rather simplistic, but that's why we added the extra column "Branch goal" so you can set your own targets because of local conditions.

Your 2014-2016 data show you had a few more guests each year than in 2017, but you converted many more of them to new members. So a question I would ask is "Why did your conversion ratio change so dramatically?"

2014: ratio = 1.36

2015: ratio = 1.00

2016: ratio = 0.75 *** implies some members transferred from another branch

2017: ratio = 2.75

At my branch, and many others, the ratio varies from 1.3 - 1.8. If the ratio drops below 1.0 you had more new members than guests attending luncheons, probably because you had members transferring from other branches without being counted as guests!

Question 3: Why not take a 3 year average for the guest conversion ratio?

Believe it or not, the first calculation we set up (in 2015) took the average of the 3 years but we ran into a problem! Not all branches had 3-year historical data, which surprised us. So to keep things simple we decided to just use 1 year's data. We could have gone more complex and created a formula which allowed for missing data, but we also found that Mac users had problems with some calculated fields so we had an added incentive to KISS!

It's always a branch's decision to set their own goals, the calculated fields are just suggestions. The alternative was to not offer any suggested goals, but we felt we should make the best effort we could. In this instance we got your great questions, and I hope the answer focuses attention on the need for guests and converting them to new members.

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