

1. Ideas for inter-club exchanges

1. Sharing transportation on activities	10. Clearly explain how to participate in another club's activities/meetings
2. Sharing Newsletter centralized (?) District 2	11. Open invitation to neighbouring clubs
3. Regional meetings/Durham	12. Exchange ideas about outings/events
4. Annual Socials – BBQ, picnics, etc.	13. Check other PROBUS websites for ideas
5. Workshops	14. Treasurer meetings to discuss financial matters
6. Area Presidents' Luncheon	15. Multiple clubs in one area? Network!
7. Exchanging speakers	16. Filter trips for PROBUS groups through one (travel) agency for better prices
8. Interclub activities (e.g. golf tournament)	17. Per #s6 and 14, organize periodic meetings for different committees to share ideas and learnings
9. Inviting Officer discussions/volunteers	

2. Social:

2. (1) Successful ideas for social/fellowship activities

1. Share newsletters (within all District 2)	15. Boat cruise
2. Christmas dinner	16. Bicycling
3. Winery tours	17. Bus trips
4. Music BINGO	18. Theatre
5. Monthly luncheons (or breakfasts)	19. Hiking/Walking x3/week (physical ability allowing)
6. Appi-parties – host agrees, people sign-up, then host calls to confirm attendance (minimizes cliques)	20. Craft activities
7. Movie night	21. Ethnic dinner monthly
8. Trivia night**; Euchre nights	22. Car rally
9. Summer BBQ at a park	23. Tic tac toe or bingo – ice breaker – “can do”
10. Card groups	24. Book groups
11. Wine tasting	25. Nine and dine (golfing)
12. Mini-golf/regional golf tournament	26. Dinner clubs
13. Guess who's coming for dinner	27. Photography
14. International nights	28. Bowling

2. (2). How do you encourage participation in events? (new and existing members)

1. Voluntold – twist arms	4. Be specific about what you're asking for
2. Movie of pictures of previous events shown either at beginning of meeting, during a break or in a members' moment	5. Be a Host, and attend events
3. Push-pull (?) and announce in Newsletter	6. One on one recruitment

2. (3) How do you get members to suggest and organize social events/outings?

1. Individual conveners	5. Leadership sharing
2. Yearly survey	6. Theatre groups - Partnership

3. List available at each meeting for members to sign	7. Put one person in charge of activity - theatre, sport, etc.
4. Volunteer social committee	8. Suggestion box (physical and virtual)

3. Speakers

3. (1) Average/Range?/\$ per speaker?

- \$150**-200; \$150-3200; \$200**; \$250; \$100-\$430; \$75; \$50-100 (travel incorporated; \$1000 for whole year, i.e. annual budget; \$1650-2000 annually; \$50-400 annually budget; \$130 per speaker)
- Get retirement residences to sponsor a speaker. PROBUS Canada sanctions this (if no members' names are given; however the sponsor may advertise their product if they wish).
- No fee if selling books
- Individuals' travel expenses are included

3. (2) How long in advance do you book speakers?

- 1 year; 6 months at least; 6-8 months

3. (3). Names of good speakers

1. Tim Burrows - Tesla	16. Kim Phuc
2. Mayor (of Newmarket (Taylor))	17. Ed Adach
3. Tess Turner – Cannabis for Seniors	18. Eke Vander ___? G. Moms, Port Perry
4. Hands-on exotics – Bev Turner	19. Brian McFarland
5. Ken Shaw, CTV	20. Marina Nehmat
6. Handwriting Analysis, Elaine Charel	21. Circles enrichment (Chris Dicarlo)
7. First responders talking about Women's symptoms of heart attacks, Antony Anderson	22. Justine Todd
8. Judy Suke, Police Dogs Fraud Squad	23. Dr. Ken Schonk
9. Marijuana use by Body Stream	24. Terry Fallis
10. Dr Amy Barren	25. Ted Barris
11. Sandy Hawley	26. Riley Moynes
12. Neil Crone	27. Bruce Bell
13. Retired RCMP on Human Trafficking	28. St. John's Ambulance
14. Dr Christopher De Carlo – Good VS Evil	29. Barbara Dickson (Bomb Girls)
15. Dr Mike Daley – Amazing music!	

4. Management Committee

4. (1). Which, if any, roles do you back up (e.g. in winter/long absences)?

1. Executives fill in as needed
2. Co-Chairs
3. Email to executive all year round, Skype or Facetime
4. Use Members-at-Large on Management Team as back-up for other roles, and for familiarization

4. (2). Successful strategies to get members involved and take on leadership roles

1. Strong committees – chair and member as vice-chair to take over	12. Appreciation picnic in June
2. Written descriptions for jobs	13. Good snacks
3. Focus on idea that this group is fun!	14. Personal contact to request help
4. Greeters at meetings	15. Mentoring
5. Keeping members informed about the jobs being done	16. Bring in young members to take over
6. Transparency – all Roles, Bylaws and Constitution posted on the website	17. Take people’s input, and acknowledge and initiate it
7. Voluntold or BEE (?)	18. Shadow execs
8. Don’t use threats or beg	19. Volunteer roster – coordinator draw from list
9. Members at Large on the Executive	20. Online sample events hosting (?)
10. Invite members (and co-chairs) to executive meetings just to observe	21. Lots of social interaction to get people invested in the club
11. Support teams who are not on the executive	22. “New Members” social as soon as they join (Canvass for greeters out of that group)

5. Membership

5. (1) Ideas for attracting new members

1. Mall kiosk	7. Word of mouth – tell friends
2. Participating in Senior events	8. Social Media
3. Inviting guests	9. Leaving brochures in strategic places
4. Free media marketing	10. Invite local newspapers to cover certain meetings
5. Be a friend, Bring a friend – have a cake	11. Booth at an event
6. Need younger members	12. Incentive for members to get new members to sign up
	13. Put in Newsletter

5. (2). Maximum number? When to split?

1. Depends on volunteer numbers
2. Depends on Club meeting-space
3. 150-175; some 200; 300?
4. Executives’ decision to split
5. Average for Canada 150
6. Seating at meetings – rows? Round tables?
7. How do you split a group? Start a new club.

5. (3). Managing waitlist and rarely-attending members

1. Max number of missed meetings (NB: *at least 1 person vigorously disagrees with this*)
2. Rarely attend, but member paid so can’t leave
3. Start new club at 200
4. Part-time membership?

5. Start a new club – no wait-list
6. Send a sunshine “we miss you” card.

6. Financial

6. (1). Appropriate Club bank balance?

1. One year’s expenses – operating/social accounts
2. Depends on annual budget – min 6 months, max 1 year
3. \$10,000 max Revenue Canada
4. GIC for 1 year of expenses
5. \$2,500+
6. Issue is how much \$ does club have over annual expenses and pass-through amounts (e.g. social activities payments).

6. (2). Successful cheque-replacement strategies

1. Credit card	6. Opinion of Outings Committee
2. Debit card	7. ? Wild Apricot?
3. EFT option	8. What about e-transfer?
4. Cheques to PROBUS	9. “Square” (Link to phone)
5. Cash difficult – no paper trail	10. Paypal?
6.	11. What’s wrong with cheque?

6. (3). Financial institutions with lowest fees?

1. BMO Community Account - \$2.50/month plus free cheques
2. Credit union Meridian
3. TD - \$1.95/month, fantastic on-line services

Charts 7, 8 and 9: “Other”

7. (1): Surveys – what types/how use/any templates?

1. Lake Country – survey; professional; on-line/paper	9. Social activity: should do survey after each event; Event survey form
2. Start/stop (doing) – in June to get advance idea	10. Suggestion box
3. Ask in survey if willing to volunteer/contribute	11. Every 2 years; electronic vs in person (survey monkey)
4. Pickering (2); results at next meeting	12. Survey Monkey easy to use
5. New members; link to renewal process	13. Checklist per table at meetings
6. Small survey on the application	14. Focus: 1. On overall satisfaction w/cl ve(?) and ways to improve
7. Short survey 1 year; longer survey next year	(2) Suggested social events for the year.
8. Trips – what and where? Physical activity	

7. (2): Successful strategies for forging corporate/partnerships

1. Use a meeting room for free and buy lunch there (e.g. golf club)	5. Municipality support - grants. NB: This may be in addition to Mayor's grants.
2. Golf course	6. Is there need for all this?
3. "Ethics" of corporate partnerships: PROBUS Canada input please. NB: Marlene Pearce's response: This is permissible as long as we do not compromise our members' info by giving it out. OK for sponsors to advertise.	7. Pickering's grant covers cost of meeting space; Chartwell caters Exec meeting and coffee for General meeting.
4. Retirement village (Stouffville)	8. Ask for free prizes

8. (1): How have you leveraged social media (fb, website, etc.)?

1. Website – contract**	6. Email members prior to meeting
2. a. Facebook **. b. NO!	7. Signup for events on the website.
3. Membership – signup on-line**	8. Retirement Villas
4. Wild Apricot – pay (paid service)	9. Local newspapers
5. Member-only bulletin board	10. Security of website to handle private info (phone #s, address, email)

8. (2): Newsletter: Electronic and/or hard copy/other?

1. Electronic, email and on website	6. Sharing newsletter
2. Website – PDF past letters	7. Try to reduce paper (electronic)
3. Frequency – usually monthly-quarterly	8. Use of Mailchimp for newsletters
4. Hard copy mailed (?) 1 at meeting	9. Try to get high quality newsletter
5. Hard copy available at meeting (few)	

8. (3): Members' book? Hard or e-copy? With photographs? Which role does it?

1. Photo on e-copy only	4. Distribute to all members/with opt out option
2. Membership must opt in for e-copy on website	5. With permission only
3. Anonymity	6. Email only and updated monthly

9. (1): Who (which role) takes care of 'publicity' i.e. A/V, photographs, etc.

1. Newsletter/photographer role	5. Email reminder of meeting - Publicist
2. Photography Interest Group Co-ord captains this	6. Newsletter Editor
3. Slideshow of past events at beginning of GM/everyone sends to Newsletter editor or website	7. Photographer to webmaster – for monthly show on website
4. Publicity vs members' updates	8. Webmaster

9. (2): Value of consistent titles across PROBUS?

1. Program/Trip/Social; Program/Speakers - not consistent
2. Activities vs special events
3. More standard = easier contacts

Not _____ | _____ **X** _____ **Should be**
Important **Consistent**

2019 NOTES/Learnings:

1. Unnecessary work would have been greatly reduced if titles were consistent across D2 Clubs.
2. Current titles are: President; Vice President; Treasurer; Secretary; Speakers; Past President; Member at Large; Social (which now includes Interest Groups); Webmaster; Newsletter.
3. It was unclear to show 'Speaker Coordinator' as 'Program Coordinator', as this also meant (for some clubs) Social/Interest Groups.
4. As things evolve and if the role becomes more defined across clubs, 'Publicity Coordinator' (looks after A/V, photographs, Employee book, etc.) may be a fixed new title. In some clubs this role is done by Members-at-large.
5. Similarly, 'Interest Groups Coordinator' (who looks after things like Cards, setting up Book Clubs, etc.), may warrant being separate from 'Social', to create more emphasis on the activities managed by the role.