Outputs: Social

Best Practice: What works well in your role	Inefficiencies: What gets in the way	Potential/Solutions: Things you've tried; learnings
1. Pay up front 2. If they cancel, they are responsible for finding a replacement 3. No exchange; ONLY if possible, accommodate 4. Reminder email 5. Use outside vendors 6. Plan ahead, 3-6 months 7. Ask another PROBUS group (for bus trips) 8. Include food in outings 9. Using a private tour company e.g. Mary Morton (?) 10. 'New member meet-up' social 11. Survey members to get ideas for Interest Groups 12. Carpooling: At sign-up, find out who needs a ride, and who is willing to drive. Capture this info on a standard form created for this purpose. 13. Have a great variety of options, to appeal to a number of people 14. Balance between 'cheaper' trips and activities, and more expensive ones = gets more sign-ups 15. No cash payment: cheques/etransfers provide proof 16. Cheques (as payment) are submitted immediately rather than credit card. 17. Booking bus trips 18. Provide advance notices of events	1. Payment 2. Recruiting for Social Committee 3. Feedback (or lack thereof?) 4. Negative people 5. Cancellations 6. Older members often don't want to organize/participate 7. Website updates not frequent 8. Hard to get new Interest Group leaders 9. Trying to find enough drivers for carpooling 10. Finding and creating variety in activities offered 11. People not remembering they signed up – or don't show up 12. People who now say they no longer use cheques 13. None, whenever a trip is determined 14. Arranging bus trips, then filling the bus and ensuring payment 15. Can't fill a bus, then having to organize with other clubs for people and payments	1. Book buses and charge for 30-40 2. Have people pay directly to tour company 3. Reminder email or phone call 4. Follow-up a Speaker with a trip to the place they talked about 5. Carpool list 6. For carpooling, meet at the driver's home or a central place vs picking people up at their homes 7. Ask members for ideas 8. Have committee to brainstorm ideas for activities, and have volunteers to help organize 9. Where there are no cheques, have a friend pay for you by cheque, and you pay them back in cash 10. Single-source/same travel agent for bus trips 11. Great Canadian Company or Hammond Bus are good options

NB: "One club has a travel-agent member who organizes outings. Many at our table were concerned about that (i.e. a member benefiting financially)".

Outputs: **Members-at-Large**

1. Be available to head up any special projects i.e. sound system, car rally, Xmas party, etc.	1. Challenge getting payments from participants	1. Adopt on-line payment system e.g. 'Square' as mentioned by Marlene

Outputs: **Membership**

Best Practice: What works well in your role	Inefficiencies: What gets in the way	Potential/Solutions: Things you've tried; learnings
1. Registering/application and payment on-line - it happens immediately 2. Electronic (on-line) membership registration 3. "Official' Membership badge – the company, Strath Craft, is very easy and pleasant to work with and highly recommended by PROBUS Richmond Hill	1. Service-charge for on-line payments 2. Members who do not have email and payments come later 3. Lack of enthusiastic volunteers	1. Change by-laws to allow termination (of absent members) 2. Limit membership to 1 club only 3. PROBUS Canada to cover service charge of purchasing 'Square'? 4. Purchase 'Square' (at additional cost)? 5. Wild Apricot?

Outputs: **Newsletter**

Best Practice: What works well in your role	Inefficiencies: What gets in the way	Potential/Solutions: Things you've tried; learnings
1. Coordination with Webmaster to reduce duplication and size of Newsletter 2. Little icons that designate what section you are looking at 3. Asking for photos and articles from members 4. "Person of Interest" profile 5. "What does PROBUS meant to me?" feature (will get to everyone in awhile) 6. Variety is the spice of life 7. Inclement weather information 8. Newsletter on website which becomes a back-up archive	1. Electronic issues being recognized as SPAM 2. Members not being able to open Newsletters 3. Size: Is the Newsletter (hard and electronic copy) getting too big? 4. Finding a successor for the role 5. Paper copies are a pain	1. Using website for most of the social/ outings information 2. Get an editing assistant or two, then mentoring someone for ½ - 1year 3. Tech outing – tech-savvy members help those alienated/unfamiliar with technology to get to the Newsletter-reading level

Outputs: Past President

Best Practice: What works well in your role	Inefficiencies: What gets in the way	Potential/Solutions: Things you've tried; learnings
1. Going table to table and talking to members 2. Open, relaxed style meeting 3. Going to see new town Mayor – let him know size of Seniors Clubs (i.e. members with a vote) and about PROBUS 4. Ask new volunteers to sign up on sheets of paper instead of saying "Come and see me"	1. Dues collection by cheque – 340 members 2. Lack of new volunteers 3. Meeting-room size and cost 4. Ability to get new Vice President	1. Face-to-face approach 2. Trial events – preview 3. Use Members-at-large roles to move people into Mgmt roles 4. Co-Presidents and Co-Vice Presidents

Outputs: President

Best Practice: What works well in your role	Inefficiencies: What gets in the way	Potential/Solutions: Things you've tried; learnings
1. Create a cohesive, supportive management committee 2. 2 people in one role – enables consistent coverage (shared voting?), complementary skills and less pressure 3. Strong management team 4. Consensus mgmt. 5. Written suggestions (suggestion box) and constructive comments only 6. Keep Past Presidents active – as mentors 7. Management Team has to proactively recruit members to the Member-at-large role 8. Partner/sponsorships in community (Seniors' Clubs, golf clubs, etc.). 9. Greeters of new members 10. New members luncheon (to share info about the Club) – interest groups, roles, etc. 11. Agenda for meetings: keep discussions on topic; involvement of new members	1. People volunteer or say they want to be members, but don't attend; ns 2. Members demanding paper copies of everything (NB: this was hi-lited) 3. We are at maximum capacity so what next? People on waiting list may not want a new club because they like yours 4. Mixed versus single-gender clubs 5. Old photos, etc. – what to do with them? 6. Collecting information and not using it 7. Identifying new members and guests 8. Lack of control as a leader (at Meetings and Board) 9. Getting people to volunteer for the Management Committee	1. Confidential management meetings 2. Promote 1-year terms, with people changing jobs within the Mgmt Team 3. E-mail correspondence to members directly. Can be removed if disruptive 4. Brenda Andrews re new Clubs 5. Communication to identify people and their interests (Roles and Interest Groups) 6. Agenda in advance 7. Meetings and minutes produced (action items): info provided; timelines for discussions; site of meetings 8. Personally approach people to take on Mgmt. roles and/or make requests at Monthly Members' Meetings

Outputs: Secretary

Best Practice: What works well in your role	Inefficiencies: What gets in the way	Potential/Solutions: Things you've tried; learnings
1. Members of the executive send Secretary copy of reports before executive meeting 2. Report re Membership and Social sent ahead of meeting to President and Secretary 3. Agendas sent out ahead of time by Secretary or President 4. President reviews minutes for errors or to make sure it is politically correct 5. Minutes have a summary of decision making re issues, at top of minutes copy 6. Electronic formats 7. Templates	1. Someone who does not send report 2. Minutes which do not include <u>major points</u> or <u>action items</u>	1. Set expectation

Outputs: **Speakers**

Best Practice: What works well in your role	Inefficiencies: What gets in the way	Potential/Solutions: Things you've tried; learnings
1. Orillia has 5 people involved in selecting the speakers. Each person is responsible for 2 speakers (10 total) 2. Speakers are rated 1-5 3. Alternate between speakers who are informative and entertaining 4. Speaker on Crop Circles was very interesting 5. Check out speakers from other seniors' groups 6. PROBUS Canada and Circles of Enrichment 7. Ask other members for suggestions 8. Contact Toronto Star re speakers 9. Approach retirement homes re speakers 10. RCMP – amazing talk on human trafficking 11. D Manningful for speaking with the Toronto Archives	1. Some (speakers) won't come – mileage 2. Money – budget from the club 3. Location 4. Member pushes some subject 5. Keep subjects positive 6. Look them (speakers) up on You Tube 7. Speakers going on too long 8. Facility to host meeting in smaller areas 9. No-show speakers	1. Set a budget number 2. Get speakers from Colleges/Universities 3. Open up to retirement home/senior' apartment in the area on a one-time basis, and share cost 4. Let speakers know the time-frame – when to start and end 5. Take photo of the equipment available so if speaker co-ord is absent, there are knowledgeable people to help 6. Open up the floor to having members do bio's 7. Some sort of 'thank you' gift if speaker is not requesting cash

Outputs: **Treasurer**

Best Practice: What works well in your role	Inefficiencies: What gets in the way	Potential/Solutions: Things you've tried; learnings
1. Spreadsheets 2. Quick books 3. Wild Apricot/AFFINI (?) Pay 4. Libra Office (spreadsheet)	1. Evolution of banking!! 2. Time requirements 3. Members resisting electronic methods 4. Too many people wanting to pay cash	1. Offer training to members to use electronic payments (website) 2. Separate cheques for each event/payment

Outputs: **Vice President**

Best Practice: What works well in your role	Inefficiencies: What gets in the way	Potential/Solutions: Things you've tried; learnings
1. Cohesive Mgmt committee with total support of one another 2. Appi-parties to increase social times and get to know you 3. Supporting the President 4. Keep the meeting on track; remind President to move on 5. Back-up for missing exec: define the role, and strengths required	1. Finding Mgmt Committee members 2. Payment methods for membership, outings, etc. 3. Conflict of Mgmt personalities 4. Important to keep confidentiality of Mgmt discussions 'under the dome' 5. There is no real defined role for the VP; they need to know that they will be President and time-line	1. Extend term of the Pres/VP/Past 2. Electronic transfers? 3. One-on-one discussions and open lines of communication 4. Stress importance of confidentiality regularly 5. PROBUS email address (?) 6. Define roles, please! 7. Have back-up for missing exec

Outputs: **Website Designer**

Best Practice: What works well in your role	Inefficiencies: What gets in the way	Potential/Solutions: Things you've tried; learnings
1. We can work from remote locations	1. Computer knowledge of membership	1. Workshops 2. User manual