



## Program Planning

Program planning is the most commonly asked area of ShareClub concern. What and how do we plan?

Because the program is the ingredient responding to training, member attendance and sociability, it is important. In short, it raises questions about the Club like - What is our mandate?

My suggestion is that you offer some of what is asked for and some of what is needed to become better investors. The combination will serve most Clubs but it is essential that the program planner know the capability of individual membership too.

As each Club year starts, consider a planning session with several colleagues to identify and rank the subject areas that are worthy of presentation. Find a theme to follow, and define the components of that subject as may be offered, knowing all along some adjustment in timing or scope will have to be made as a program is delivered.

If you follow the format, a logical sequence will emerge and that becomes the plan... a linear plan.

The alternative is a random plan, filling in meeting slots as some presenter is available or offers. This is a random planning approach and has limitations.

Perhaps an in-house survey should be conducted, which will guide you because it shows areas of interest. But consider your membership as a whole. Some topics are worth repeating as essential subject matter to bring the membership to next level.

Try for a combination of in-house and external presenters on the defined theme. By members doing the research and making a short presentation, many benefits accrue. Also, have a presenter (usually a member) available on short notice should you face a cancellation or a no-show to fill in for a part or the full program. Back up is important!

Usually in the larger communities there are more offers from external presenters who want the publicity or the exposure that a Club can accommodate. Know the presenter and define the terms to him/her beforehand. Freebees can create problems, and there may be unstated expectations by an external presenter that you are not immediately aware of. Some subjects will require more know-how than is within your membership. In the absence of planning well ahead, what usually happens is you take who is available.

A retirement community will always have a wealth of highly experienced people in their midst. They no longer have vested interests, so find a way to tap into them as yet another useful resource base.