

# **An introduction and guide to the u3a Retention and Recruitment Toolkit – *Retaining your current members and recruiting new ones***

## **Welcome**

This toolkit is intended for use by your committee and any sub-committee or team that you set up. The purpose of the toolkit is to provide you and your u3a with tools to assist you in your efforts to retain your current members and recruit new ones.

The Toolkit has a number of different types of tool: PowerPoints, videos, *How to guides* and a checklist. The tools are designed to address the following issues:

- **Retaining your current members**
- **Developing your team, building support and dealing with objections**
- **Planning your relaunch/recruitment campaign**
- **Recruiting new members: tips and suggestions from u3as**
- **Your interest groups**
- **Using social media and the internet effectively**
- **Recruiting new members and promoting your u3a**
- **Promotional materials**
- **Enrolling, welcoming, inducting and following up your new members**

The list of tools and their intended audience is set out in the Contents table which follows. The Toolkit is quite large. You won't necessarily find that every tool is useful to your u3a. That's fine. At the risk of stating the obvious, you don't have to use every tool. We hope you will use and give us feedback on the tools most relevant to your own recruitment project.

Two of the tools are described as Swap Shops. One is about retaining your current members. The other focusses on recruiting new members. They are different from the other tools in that they are designed to facilitate the exchange of experiences and ideas between u3as. Between them, the Swap Shops provide vivid examples of u3as which are doing almost all of the things which are suggested in the *How to guides*. They are very practical and, of course, they demonstrate one of the enduring strengths of our movement: there are lots of different ways of doing things.

## **Piloting**

We have developed the tools to support u3as in their efforts to retain existing members and to recruit new members. This guide contains relevant and current information, but we realise that in this rapidly changing world things can move on quickly. We welcome your comments and feedback any relevant points you make, will be taken into account during our regular resource review procedure. Updated resources will be posted to replace the existing ones as necessary.

The toolkit itself is also being piloted. In terms of the toolkit overall, we will be asking for suggestions for tools which could be developed and added to the toolkit and, for that

matter, whether any tools should be amalgamated with others or withdrawn. We hope that with your help, we can extend the Toolkit. If you find yourselves saying 'If only we had a recruitment tool which would help us do xxxx', please email [feedback@u3a.org.uk](mailto:feedback@u3a.org.uk). We can't promise to do everything but we'll do our best.

## **Is this the right time for a recruitment campaign?**

We think that this is THE right time. Not only are a large number of people going to be retiring from work in the normal way, but they are unfortunately being joined by a large number of people aged 55+ who are losing their full time job, because of Covid19. At the same time, many of the opportunities for retired people – many sorts of voluntary activity for example - are not available. In addition, we need to equip ourselves for a world where many of the 55+ age group will be looking to the internet for inspiration.

Social distancing and periodic lockdowns are likely to be with us for the foreseeable future, so let's get on with it now.

There is a further important argument. Almost everything you do to prepare your u3a to recruit new members will also serve to strengthen your u3a and make it more and more attractive to your existing members. There is a substantial overlap between preparing to recruit new members and retaining your current members.

## **Background**

Our u3a movement is suffering from two sorts of recruitment problem. There is a long term slowdown in the growth in membership of the movement and the proportion of newly retired people joining the u3a is in decline. This may in part be associated with an over-reliance on word-of-mouth as a means of attracting new members. These long-term trends are being exacerbated by Covid19.

The Third Age Trust created a Recruitment Working Group which reports to both the u3a Development Committee and the u3a Communications and External Affairs Committee (CEAC). Representatives from thirteen u3as comprise the Working Group and have developed this toolkit. Three members of the Working Group are also Regional Trustees and several other members are also members of Regional Support Teams.

Above all this toolkit has benefitted from the practical experiences, ideas and suggestions of over 60 Pathfinder u3as who have been working with us to develop the toolkit. Without the hard work of all involved we would not have a toolkit.

With your help, we want to be able to develop it into an even better version 2.0.

## u3a Retention and recruitment toolkit – *Retaining your current members and recruiting new ones*

Tools	Audience	Notes and links
<b>Introduction to the toolkit</b> <i>Note on video links: if you have difficulty getting the link to work, you can copy it and paste it into your browser, and it should work.</i>		
An introduction and guide to the u3a Retention and recruitment toolkit	Committee Members and members of recruitment team	This is the document you are reading. There is a link to this document and to all the tools here: <a href="https://www.nottsu3anetwork.org/retention-and-recruitment.html">https://www.nottsu3anetwork.org/retention-and-recruitment.html</a>
An introduction to the u3a Retention and recruitment toolkit	Committee Members and members of recruitment team	This is a PowerPoint introduction with a full set of notes pages <a href="https://www.nottsu3anetwork.org/retention-and-recruitment.html">https://www.nottsu3anetwork.org/retention-and-recruitment.html</a>
An introduction to the u3a Retention and recruitment toolkit	Committee Members and members of recruitment team	This is a video of a presentation to u3a Network representatives from YouTube <a href="https://www.youtube.com/watch?v=-96TjLOH384">https://www.youtube.com/watch?v=-96TjLOH384</a>
<b>Retaining your current members</b>		
Retaining your current u3a members	Committee Members	This is a <i>How to guide</i> <a href="https://www.u3a.org.uk/component/edocman/recruitment-toolkit/15-how-to-retain-current-u3a-members?Itemid=">https://www.u3a.org.uk/component/edocman/recruitment-toolkit/15-how-to-retain-current-u3a-members?Itemid=</a>
<b>Swap Shop:</b> Sharing ideas to retain your current u3a members	Committee Members	Tips and suggestions from u3as  <a href="https://www.u3a.org.uk/component/edocman/recruitment-toolkit/21-swap-shop-retention?Itemid=">https://www.u3a.org.uk/component/edocman/recruitment-toolkit/21-swap-shop-retention?Itemid=</a>
<b>Developing your team, building support and dealing with objections</b>		
Making your Committee bigger and better	Committee Members and members of recruitment team	This is a <i>How to guide</i> . The link is here: <a href="https://sources.u3a.org.uk/2021/11/02/bigger-and-better-u3a-committees/">https://sources.u3a.org.uk/2021/11/02/bigger-and-better-u3a-committees/</a>  You can look at it here, but you will need to copy and paste to create a copy to download.

Preparing to recruit new members	Committee Members and members of recruitment team	This is a Checklist <a href="https://www.u3a.org.uk/component/edocman/recruitment-toolkit/05-preparing-to-recruit-new-members?Itemid=">https://www.u3a.org.uk/component/edocman/recruitment-toolkit/05-preparing-to-recruit-new-members?Itemid=</a>
Building support for recruitment in your Committee	Individual Committee Members	This is a <i>How to guide</i> <a href="https://www.u3a.org.uk/component/edocman/recruitment-toolkit/10-how-to-build-support-for-recruitment-in-your-committee?Itemid=">https://www.u3a.org.uk/component/edocman/recruitment-toolkit/10-how-to-build-support-for-recruitment-in-your-committee?Itemid=</a>
Developing a shared relaunch/recruitment project with your members	Committee Members and members of recruitment team	This is a <i>How to guide</i> <a href="https://www.u3a.org.uk/component/edocman/recruitment-toolkit/06-how-to-develop-a-shared-recruitment-project?Itemid=">https://www.u3a.org.uk/component/edocman/recruitment-toolkit/06-how-to-develop-a-shared-recruitment-project?Itemid=</a>
What could our recruitment project look like?	u3a members	This is a PowerPoint which can be customised by your u3a <a href="https://www.u3a.org.uk/component/edocman/recruitment-toolkit/what-could-our-recruitment-project-look-like?Itemid=">https://www.u3a.org.uk/component/edocman/recruitment-toolkit/what-could-our-recruitment-project-look-like?Itemid=</a>
Why we need to recruit more members	u3a members	This is a PowerPoint which can be customised by your u3a <a href="https://www.u3a.org.uk/component/edocman/recruitment-toolkit/26-why-we-need-to-recruit-template?Itemid=">https://www.u3a.org.uk/component/edocman/recruitment-toolkit/26-why-we-need-to-recruit-template?Itemid=</a>
<b>Planning your relaunch/recruitment campaign</b>		
Research on prospective new u3a members	Committee Members and members of recruitment team	Market research report for Third Age Trust <a href="https://www.nottsu3anetwork.org/retention-and-recruitment.html">https://www.nottsu3anetwork.org/retention-and-recruitment.html</a>
Planning your u3a relaunch/recruitment project	Committee Members and members of recruitment team	This is a PowerPoint which can be customised by your u3a <a href="https://www.u3a.org.uk/component/edocman/recruitment-toolkit/24-planning-your-u3a-relaunch-recruitment-project?Itemid=">https://www.u3a.org.uk/component/edocman/recruitment-toolkit/24-planning-your-u3a-relaunch-recruitment-project?Itemid=</a>
Monitoring and evaluating your recruitment project	Committee Members and members of recruitment team	This is a <i>How to guide</i> <a href="https://www.u3a.org.uk/component/edocman/recruitment-toolkit/17-monitoring-and-evaluating-your-recruitment-project?Itemid=">https://www.u3a.org.uk/component/edocman/recruitment-toolkit/17-monitoring-and-evaluating-your-recruitment-project?Itemid=</a>

<b>Recruiting new members: tips and suggestions from u3as</b>		
<b>Swap shop:</b> Sharing ideas to recruit new members	Committee Members and members of recruitment team	Tips and suggestions from u3as <a href="https://www.u3a.org.uk/component/edocman/recruitment-toolkit/20-swap-shop-recruitment?Itemid=">https://www.u3a.org.uk/component/edocman/recruitment-toolkit/20-swap-shop-recruitment?Itemid=</a>
<b>Interest Groups</b>		
Making your u3a offer irresistible	Committee Members and members of recruitment team	This is a <i>How to guide</i> <a href="https://www.u3a.org.uk/component/edocman/recruitment-toolkit/02-how-to-make-u3a-offer-irresistible?Itemid=">https://www.u3a.org.uk/component/edocman/recruitment-toolkit/02-how-to-make-u3a-offer-irresistible?Itemid=</a>
7 steps to recruiting more interest group convenors	Committee Members and members of retention/recruitment team	This is a <i>How to guide</i> <a href="https://www.u3a.org.uk/component/edocman/recruitment-toolkit/04-recruiting-interest-group-convenors?Itemid=">https://www.u3a.org.uk/component/edocman/recruitment-toolkit/04-recruiting-interest-group-convenors?Itemid=</a>
Zoom - Why should I bother?	Interest Group Coordinators and Convenors	Video on YouTube channel <a href="https://www.youtube.com/watch?v=hKd5qxxVoY">https://www.youtube.com/watch?v=hKd5qxxVoY</a>
Get your u3a interest group on line in 5 simple steps	Interest Group Coordinators and Convenors	Video on YouTube channel <a href="https://www.youtube.com/watch?v=WHyPh80Rqlo">https://www.youtube.com/watch?v=WHyPh80Rqlo</a>
<i>Every</i> u3a interest group can go online!	Interest Group Coordinators and Convenors	Video on YouTube channel <a href="https://www.youtube.com/watch?v=thQb6mv8CeU">https://www.youtube.com/watch?v=thQb6mv8CeU</a>
Hosting your zoom u3a interest group	Interest Group Coordinators and Convenors	Video on YouTube channel <a href="https://www.youtube.com/watch?v=pHvqFQUKBUU&amp;t=47s">https://www.youtube.com/watch?v=pHvqFQUKBUU&amp;t=47s</a>
Zoom screen sharing for u3a interest groups	Interest Group Coordinators and Convenors	Video on YouTube channel <a href="https://www.youtube.com/watch?v=x5bzsl7H32E">https://www.youtube.com/watch?v=x5bzsl7H32E</a>
<b>Using social media effectively</b>		
Social media: choosing and using	Committee Members and members of recruitment team	This is a <i>How to guide</i> in the form of a Powerpoint <a href="https://www.u3a.org.uk/component/edocman/recruitment-toolkit/23-social-media-choosing-and-using?Itemid=">https://www.u3a.org.uk/component/edocman/recruitment-toolkit/23-social-media-choosing-and-using?Itemid=</a>

Setting up Facebook	Committee Members and members of recruitment team	This is a <i>How to guide</i> <a href="https://www.u3a.org.uk/component/edocman/recruitment-toolkit/18-setting-up-facebook?Itemid=">https://www.u3a.org.uk/component/edocman/recruitment-toolkit/18-setting-up-facebook?Itemid=</a>
Writing for the web	Committee Members and members of recruitment team	This is a <i>How to guide</i> in the form of a Powerpoint <a href="https://www.u3a.org.uk/component/edocman/recruitment-toolkit/22-writing-for-the-web?Itemid=">https://www.u3a.org.uk/component/edocman/recruitment-toolkit/22-writing-for-the-web?Itemid=</a>
Writing for the Internet	Committee Members and members of recruitment team	This is a video from YouTube of a presentation <a href="https://www.youtube.com/watch?v=DI6I5cZ_y78">https://www.youtube.com/watch?v=DI6I5cZ_y78</a>
Measuring the effectiveness of your digital media	Committee Members and members of recruitment team	This is a <i>How to guide</i> <a href="https://www.u3a.org.uk/component/edocman/recruitment-toolkit/12-how-to-measure-digital-media?Itemid=">https://www.u3a.org.uk/component/edocman/recruitment-toolkit/12-how-to-measure-digital-media?Itemid=</a>
Getting and keeping website and social media traffic	Committee Members and members of recruitment team	This is a <i>How to guide</i> <a href="https://www.u3a.org.uk/component/edocman/recruitment-toolkit/11-how-to-get-and-keep-website-and-social-media-traffic?Itemid=">https://www.u3a.org.uk/component/edocman/recruitment-toolkit/11-how-to-get-and-keep-website-and-social-media-traffic?Itemid=</a>
<b>Recruiting, relaunching and promoting</b>		
Relaunching your u3a	Committee Members and members of recruitment team	This is a <i>How to guide</i> <a href="https://www.u3a.org.uk/component/edocman/recruitment-toolkit/14-ways-to-relaunch-your-u3a?Itemid=">https://www.u3a.org.uk/component/edocman/recruitment-toolkit/14-ways-to-relaunch-your-u3a?Itemid=</a>
Transforming your website into your shop window	Committee Members and members of retention/recruitment team	This is a <i>How to guide</i> <a href="https://www.u3a.org.uk/component/edocman/recruitment-toolkit/08-how-to-transform-your-website?Itemid=">https://www.u3a.org.uk/component/edocman/recruitment-toolkit/08-how-to-transform-your-website?Itemid=</a>
Transforming your website: 3 presentations	Committee Members and members of retention/recruitment team	Video on YouTube channel <a href="https://www.youtube.com/watch?v=kECgQ7BUT5k">https://www.youtube.com/watch?v=kECgQ7BUT5k</a>
Pop up displays for recruitment	Committee Members and members of recruitment team	This is a <i>How to guide</i> <a href="https://www.u3a.org.uk/component/edocman/recruitment-toolkit/07-pop-up-displays-for-recruitment?Itemid=">https://www.u3a.org.uk/component/edocman/recruitment-toolkit/07-pop-up-displays-for-recruitment?Itemid=</a>
Promoting u3a membership online	Committee Members and members of recruitment team	This is a <i>How to guide</i> . You can find this tool by following this link: <a href="https://www.nottsu3anetwork.org/retention-and-recruitment.html">https://www.nottsu3anetwork.org/retention-and-recruitment.html</a>



Using Facebook adverts	Committee Members and members of recruitment team	This is a <i>How to guide</i> <a href="https://www.u3a.org.uk/component/edocman/recruitment-toolkit/19-facebook-adverts?Itemid=">https://www.u3a.org.uk/component/edocman/recruitment-toolkit/19-facebook-adverts?Itemid=</a>
<b>Promotional materials</b>		
New Brand Banner	Prospective new U3A members	From u3a Brand Centre on u3a national website <i>But you have to be an authorised user to be able to see them.</i>
New Brand Leaflets	Prospective new U3A members	
New Brand Posters	Prospective new U3A members	
New Brand Digital assets: logo etc	Prospective new U3A members	
Model emails and letters for promotion and recruitment	Organisations running pre-retirement courses	This is a <i>How to guide</i> containing a number of different model letters and emails which can be customised by your u3a  <a href="https://www.u3a.org.uk/component/edocman/recruitment-toolkit/16-model-emails-and-letters-for-promoting-your-u3a?Itemid=">https://www.u3a.org.uk/component/edocman/recruitment-toolkit/16-model-emails-and-letters-for-promoting-your-u3a?Itemid=</a>
	Councillors/MPs/ faith communities/ health professionals	
	Employers and HR managers	
<b>Enrolling, welcoming, inducting and following up new members</b>		
Enrolling and welcoming new members online	Committee Members and members of recruitment team	This is a <i>How to guide</i> <a href="https://www.u3a.org.uk/component/edocman/recruitment-toolkit/09-how-to-enrol-members-online?Itemid=">https://www.u3a.org.uk/component/edocman/recruitment-toolkit/09-how-to-enrol-members-online?Itemid=</a>
Online <i>Welcome Pack</i> for new members	New u3a members	From u3a Brand Centre on u3a national website. Can be customised by your u3a. <i>You have to be an authorised user to be able to see it.</i> You have to click on the words not the picture of it. Then you have to add all the details you require for your u3a. Then when you 'buy', it tells you it is being prepared for you and you will get an email to say it is ready and downloadable.