

How to guide: Enrolling and welcoming new members online

Introduction

The purpose of this guide is to suggest how you might welcome and integrate new members into your u3a online. Spalding and District u3a has very kindly provided a case study of how they manage their welcome, attached at the end of this guide.

This issue is particularly important now, since methods developed by most u3as have been disrupted. Pre-Covid19, visitors and potential new members would have been invited to attend the monthly meeting where they would be enrolled, made welcome, paid their subscription, been introduced to the u3a and its interest groups, and perhaps invited to sign up for groups. They may have been allocated a 'buddy', and will probably have been invited to a new members meeting. All this has been disrupted by the pandemic.

We are feeling our way in a changed world. We would be very grateful for your feedback about this guide and we seek to learn from your experiences of welcoming new members online. **Please keep a note of your suggestions for improvement and send them to feedback@u3a.org.uk**

First online contact with a prospective member

Potential members will make first contact with your u3a via any points of contact given on your website, or in your newsletter. This means that a large number of people in your u3a might receive an enquiry and they need to know what to do with it.

There are many different solutions, but the most efficient might be to alert all members of your u3a that there is someone on your committee who will act as a **point of contact** for all prospective members. For the purposes of this guide, we'll call them a Greeter.

If you are a large u3a or if you're receiving lots of new contacts, you might have more than Greeter. All first contacts could be referred to your Greeter(s), if you adopt this approach.

The Greeter's job is very important because they will form someone's first impressions of your u3a. Perhaps the most important things for the Greeter to achieve are to

- make a rapid (i.e. immediate if possible) response to the first contact
- establish the best means of communicating (probably email, but it could be via a Facebook message, WhatsApp, telephone call etc)
- provide an initial warm welcome
- answer any questions and give an impression of your u3a (remember, you are selling opportunities and benefits!)
- sign up the new member to your u3a by sending them an electronic enrolment form (assuming this emerges during the conversation as the desired outcome)

Enrolling your new member

You will have your own methods for enrolling a new member. You might be able to do everything online in a single transaction. Failing that, you may rely on an electronic enrolment form which your new member returns to your Membership Secretary with a cheque in the post, Pa Pal payment, bank transfer etc.

Ideally, your Greeter, Membership and Treasurer functions will liaise with each other so that if the enrolment form is not returned within a specified time, your Greeter can contact the prospective member and find out if they have changed their mind or if there is an issue which needs to be resolved.

This is sensitive stuff, but if your Greeter finds out that prospective members are changing their mind because of some aspect of your u3a operations, this is potentially vital information that needs to get to your Committee or your recruitment team.

On your enrolment form, it might be worth adding questions about:

- how your new member found out about your u3a
- their interests
- any interest groups they wish to join
- what they might be able to bring to your u3a in terms of interests and skills

NOTE

If a new member isn't able to participate online due to lack of skill/knowledge, it would be helpful to have current members available to offer support.

If a new member isn't able to participate online at all, the Greeter should ensure that they receive relevant paper-based information

Welcoming your new member

How do you replicate online the sort of welcome you used to provide face to face?

We suggest that you have a person or a group of people who can act as **Welcomers**.

They could be the same people as the Greeters and combine both roles. They could include your Membership Secretary.

The point is that *welcoming* new members is a different function to *greeting*.

Ideally, the Welcomer will have access to the enrolment form completed by the new member, and the conversation might take the information provided by the new member as a starting point.

Role of the Welcomer might include

- Making rapid one-to-one contact with the new member

- Starting your u3a's relationship with the new member, explaining your u3a processes, establishing the interests of the new member, finding out what the new member might offer to the u3a
- Clarifying how your u3a operates and its core principles
- Ensuring new members know what is available to them, when it is available and how to access it, both within your u3a and outside it: There's a lot of information to convey – some of it might best be deferred to your new members' meeting:
 - within your u3a: online meetings, activities e.g. quizzes, interest groups, newsletter, website
 - outside your u3a: *Third Age Matters*, e-newsletter, u3a Facebook pages, YouTube,
- Sending out your electronic Welcome Pack (see separate *New Member Welcome Pack* in the Toolkit which you can customise to your own u3a)
- Inviting the new member to an online meeting of new members where they can ask questions, raise issues, chat about their reasons for joining, find out what's happening/available internally/locally/nationally, put faces to names (via photos on a shared screen or by meeting some Committee members).

Getting your new members involved with your u3a

You will have your own processes to involve your new member. Pre-Covid, most of this process could be done at your monthly face-to-face meeting. Online it's a bit more complicated. Ways of doing this might include:

- Inviting your new member to look at interest groups which may not unfamiliar to them (see the How to guide: make your offer irresistible)
- Contacting a new member every couple of months during their first year to make sure they are enjoying their experience (*Chepstow u3a found that this dramatically reduced the proportion of new members who did not renew in the following year*)
- Introducing the new member to a buddy if your u3a operates a buddy system
- Sending your new member your most recent newsletter, and a schedule of online meetings if you have these organised. Direct them to your website.
- Providing your new member with an introduction to specific interest group convenors
- Inviting new members to a second new members' meeting after 2 or 3 months
- Introducing new members on your Facebook page, inviting them to join Facebook.
- Ensuring that new members have the skills to be able to join whatever video platforms your u3a is using (most popular seems to be Zoom).

Why not celebrate?

In these extraordinary times, it's helpful to celebrate good news. Consider regularly making reference to new members and their involvement in u3a life in your newsletter and social media, and via local press and national u3a platforms: Third Age Matters, u3a Facebook page, u3a Newsletter.

A case study follows, from **Spalding and District u3a**

Case Study: Spalding and District u3a

For those moving into the area, first contact is often made through our website and the membership secretary or group co-ordinator will answer questions, forward general information and suggest they attend our next monthly meeting. Our membership secretary has also arranged coffee mornings to enable new members to meet each other.

Caroline who's lived locally for nearly 40 years, heard about the u3a from a cousin, a u3a member, who lives in Wiltshire.*

Now retired, with more time on her hands and keen to meet new people, Caroline attended two monthly meetings and decided on her second visit to become a member. With lots of interests covering crafts, history, music, gardening and walking she was only able to join the one group – Dancing for Fun – before we went into Lockdown, and has been made to feel welcome by those she has already met.

****Not her real name***

While Caroline joined at a face to face meeting, as more people embrace technology joining on-line will become more popular, as we have seen in the use of Zoom for both group and monthly meetings.

Members have already joined in this way, making initial contact via our website, where there are direct links to committee members and where they can then easily download a membership form for completion. Payment can be by cash, cheque or bank transfer online. When the payment clears, a membership number is issued and our new member can then apply to join any of the interest groups.

We are seeing an increase in those who join online, perhaps because everyone has become more tech-savvy. We have a new Treasurer who is exploring the idea of a link from the membership form to the direct payment form (currently separate), which would make it an even easier process.

Spalding and District u3a