u3a Guide

How to guide:
Monitoring and evaluating your recruitment project

Introduction

This guide is intended for use by your committee and any sub-committee or team that you set up to recruit new members. It suggests how you can monitor and evaluate your recruitment project. We recommend that you do 3 main things:

1. Clarify what you want to achieve and how you will measure success

2. Identify any changes you need to make as you implement your recruitment project

3. Identify what works best for you and share that learning with other u3as

In drafting this guide, we have followed two basic principles

The first is economy. Every hour of time and ounce of energy that we spend monitoring and evaluating is time and energy that aren't available for recruiting new members. This is therefore a very simple and straightforward guide.

The second is to employ a mix of quantitative and qualitative methods, which generally work best in evaluating this sort of project. Quantitative means involving measurable numbers. Qualitative means using anecdote, impressions and opinion

Oceans of ink have been spent on this subject. This is the first time that anyone [at least in English] seems to have drafted a guide for use by u3a organisations. Being first is a bit lonely so we are asking for your feedback order to create an improved version.

Your experiences of using this guide are of vital importance. **Please send your suggestions for improvement to feedback@u3a.org.uk**

What do you want to achieve?

Presumably this can be expressed as more members. You may have more specific objectives: recruiting people who have ceased full time work in the last year or two, for example. You might be seeking to ensure that your membership is more representative of all the communities in which you are based.

How will you measure success?

This is one of the most vexed questions. Again, even more inky oceans have been devoted to the subject. Two general principles are that you will want to measure what's important and avoid selecting measures that tell you little or nothing but for which you happen to have the data. The table on the next page is a worked example of the measures which might help you to implement these two principles.

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TABLE 1: Evaluation measure for recruitment project: worked example

Type of measure	Specific measures	Data Available
Impact	Effectiveness of promotion or advertising	Information from new members about how they heard of your u3a (*this question could be included on your application form*)
	Effectiveness of specific type of promotion	Estimated numbers of visitors to a pop-up stall
		Responses to different sorts of online promotion e.g. to Facebook adverts, responses to your Facebook *page*; gifts of membership subscription sold on ebay or any other online platform
		Visits to your website. Visits to a particular interest group page on your website if you have been promoting that group
		Responses to your letters and phone calls to local influencers
Conversion rates	% of first contacts which convert into new members	% of online contacts and visitors which convert to members (from enrolment questionnaire)
		% of visits to pop up (and similar activities) which convert to new members (from enrolment questionnaire)
		visitors to your website who convert to new members (from your enrolment questionnaire)
Increased membership	Number of new members	Number of new members from enrolment data
Increased recruitment of members with particular characteristics	No. of new members of a particular type – age, sex, ethnicity etc.	Number of new members using postcode as a proxy from enrolment data
		Age or ethnicity of new members – this is likely to be a guess (estimate) *unless* you collect such data through your enrolment processes
Retention rates	% of new members who enrol for a second year of membership	Your enrolment data

Monitoring

You will want to monitor your progress as you go along in order to check what's going well and stop doing or change anything that's not working. Bearing in mind that the more frequently you monitor, the less reliable the data might be. In other words, the smaller the packets of information or data, the more they will be subject to random variation.

On the other hand, you don't want to leave monitoring until it's too late to retrieve something or divert energy and time to activities that seem to be really successful.

The easiest and quickest form of monitoring is probably through regular (but not too frequent) reviews of the available evidence by your core recruitment team, looking at whatever anecdotal or qualitative evidence and relevant data (from the measures you have adopted) that you have available.

Overall evaluation or lessons learned

This is how you draw conclusions towards or at the end of your project. Part of your overall evaluation will be how successful you have been in achieving your recruitment objectives. The way to evaluate this is by evaluating outcomes using the measures you have chosen.

We would also be really grateful, if you would also do a short overall evaluation which we can use to develop further the recruitment toolkit and also to learn from your experience so that we can share your learning with other u3as. Below is a draft model for the overall evaluation.

TABLE 2 Overall evaluation for a recruitment project		
Subject of evaluation	**What we need to know**	**Type of evaluation**
Recruitment methods	What types of promotion worked best?	Quantitative assessment using measures you have chosen
	What types of promotion worked least well?	
	What would you do differently or better?	Qualitative assessment from your core recruitment team
Utility of recruitment toolkit	Which tools worked well?	Qualitative assessment from discussion in your core recruitment team
	Which tools need to be improved?	
	Is anything missing from the recruitment toolkit?	
Lessons learned	What *general* advice would you give to another u3a about recruiting new members?	Qualitative assessment from your core recruitment team
	What advice would you give to a u3a similar to your own u3a, about recruiting new members?	Qualitative assessment from discussion in your core recruitment team

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