

## How to guide:

### Retaining your current u3a members

#### Introduction

Many u3as have been expending an enormous amount of time and energy on keeping their u3as alive during the pandemic. As ever, every u3a has its own unique approach. This guide attempts to pull together the experiences of u3as, many of which have been involved in the u3a Pathfinder project to trial and test ways of retaining existing members and recruiting new ones.

Broadly speaking, u3a strategies fall into six main areas:

- Contacting non-renewers
- Communication, communication, communication
- Multiplying social, general u3a and interest group opportunities online
- Technical support and help
- Subscription and payment issues
- Surveys, consultation and canvassing for new ideas

In the past, member retention may not necessarily have been a priority. u3as have always been subject to some annual 'churn' as some members do not renew but other new members join. Responses to the recent u3a national survey suggest, however, that covid is seriously impacting renewals. Potential reductions in numbers may be a reality for many u3as going forward. It is possible that your u3a may be significantly reduced in size and you could find yourselves beginning to struggle.

Whether you are currently thriving or surviving, we hope you will find some useful suggestions in this guide to help you retain your current members. There are quite a few examples and illustrations of what u3as are doing to retain members and there are many more in another document in the toolkit: *Swap Shop: Sharing ideas to retain your current u3a members*.

We will be collecting feedback to create an improved version for use by u3as. Your experiences of using the guide are of vital importance. **Please email your suggestions for improvement to [feedback@u3a.org.uk](mailto:feedback@u3a.org.uk)**

#### **Contacting non-renewers**

Some u3as have deferred membership renewals for periods between a few months and a year. Sooner or later, however, you will need to ask your members to renew their subscriptions.

From the evidence of the national survey, it seems that many u3as are expecting or have experienced a drop of between 10% and 20% in their membership, sometimes despite several

reminders sent to members by email or by post. Judging by the experience of Pathfinder u3as, there is no substitute for making personal contact by telephone with people who have not renewed their membership. In the words of **Holmes Chapel and District u3a**:

*105 Of our 675 members had not renewed their membership (several months after the due date) I, as membership secretary, decided to telephone each one (which took about a month) From 675 members we (now) have 641, a net loss of 5%. There is no doubt that the loss rate would have been substantially higher if we had not been proactive in following people up.*

In the case of **Benfleet u3a**, telephone follow-up revealed that part of the problem was that some members couldn't download their renewal form:

*....by late June I had a list of the 15 members who had not renewed. I phoned each one and either talked to people or left messages. The commonest problem was lack of facilities for printing the renewal form. So, we hand delivered or posted forms to those people (as we had already done for the members we have who don't have computers). 9 of the 15 renewed.*

Before the pandemic, there was some anecdotal evidence of a 'revolving door' pattern where u3as recruited new members, but where such members don't renew their membership for a second year. Among Pathfinder u3as, **Islington u3a** interrogated its records and found that:

*...one of our most pressing problems is non-renewal after just one year of membership. Whilst our overall membership level is steady and we are still recruiting new members our non-renewal rate, we have decided, is too high even allowing for the current unusual circumstance of the pandemic.*

**Plymouth u3a** has launched a review of the information that a new recruit receives. This is important because it was clear from feedback that the u3a was failing those members who join on-line and the u3a felt the issue had never been fully addressed.

Some suggestions to help make new members feel welcome and involved in their u3a are set out in another toolkit guide: ***Enrolling and welcoming new members online.***

### **Communication, communication, communication**

The most widespread strategy to encourage members to be loyal to their u3a is based on communication. The majority of u3as have made the most strenuous efforts not just to maintain contact with members, but even to develop, extend and increase communications.

The picture that emerges from most Pathfinder u3as is that their newsletter has played a key role in keeping members involved and in touch. Sometimes, newsletters have been supplemented by more frequent bulletins or briefings. Sometimes the frequency of the newsletter has been increased. Quite often, the range of topics covered has grown to encompass any and every sort of content which entertains and interests members: quizzes, recipes, jokes, poetry, interest group reports etc.

Most u3as distribute their newsletter online, and, prior to the Pandemic, made paper copies available to members without an internet connection (or sometimes a printer) at their general

meetings. During the lockdowns, postal and even delivery by hand for non-internet-enabled members seems to have become the norm.

**In Tunbridge Wells:**

*Reaching members not on email has been difficult. They receive our Newsletter by post which, since the first lockdown, has been printed in colour (previously printed versions were in black and white). We also produced an edition in December (previously only each month from January to November).*

*We have ensured that each Newsletter contains things for those not online to do such as patterns for facemasks, quizzes, crosswords etc. The committee also telephoned all members who are not on email before Christmas. Many were elderly and seemed mildly surprised, though pleased, that we had done so.*

**In Easingwold and District:**

*We have 17 members not on email and we deliver hard copy to them as we email our bulletin. We did introduce a weekly bulletin to support members at the beginning of lockdown, giving helpful ideas and telling what was possible support in the local area. Now we have reduced to monthly but we have made the decision to deliver hard copy to all members.....*

**In Crewe and Nantwich:**

*Under the leadership of a new Editor, our Newsletter has expanded considerably both in terms of its length and the number of willing and talented contributors from the membership.*

**In Eastwood:**

*The production of our monthly newsletter has included a variety of new projects such as 'u3a eye' a twice monthly photograph theme. Also an 'online board games' group and 'virtual coffee mornings / quizzes' being set up and shared.*

**In Pontesbury and Rhea Valley:**

*Our publicity officer has worked with extraordinary energy and commitment to increase the contact we have with the membership. The frequency of the Newsletter increased from a monthly to a three weekly cycle. This has been accompanied by new features designed to engage the interest of members such as the Third Page which has invited them to contribute around a series of set themes. There are also regular quizzes, jokes, riddles, and items from Interest Groups.*

The plethora of online general meetings, WhatsApp, Facebook groups, Zoom interest groups, emails and AGMs etc is summarised in the next section. Here, it may be worth pausing to think about telephone trees and similar means of communicating with members who are *not online*.

Regular telephone contact seems to be a key strategy for contacting offline members. This is potentially very time consuming for the volunteers – often from the committee - who do the contacting, all the more time consuming in large u3as.

**Chepstow u3a** has developed a Telephone Chatline to contact members. They found that the Chatline could become increasingly self-sustaining as members who were contacted volunteered to ring other members.

In the words of the u3a:

*As we prepared to go into lockdown in March we discussed our concerns about those of our members who didn't have access to the internet, or who really didn't use the internet, and lived alone. Our Membership secretary went through Beacon and identified those members who we felt were at risk of isolation and loneliness. Volunteers on the committee then phoned people on a weekly basis, rotating the list amongst the volunteers.*

*Most people on the list were very happy to chat to someone once a week, some were too busy in their gardens or with other projects, some wanted to join the group of volunteers and chat to others on the list [my emphasis]. Our membership secretary has expanded the list when we hear of a member who is struggling. Our Chatline has now been active for eight months and is a vital part of our communication with members.*

### **Multiplying social, general u3a and interest group opportunities**

There is literally no end to the inventive, multifarious and ingenious ways that u3as have embraced online opportunities, mostly with great success. Who would have thought that a wine tasting group could be recast as an online u3a bar? Who would have imagined that attendance at AGMs or some interest groups could actually be increased when they take the form of Zoom rather than Face-to-Face meetings.

A handful of quotations from Pathfinder u3as will give a flavour of the ways that u3as have made themselves into *virtual* u3as to beat Covid and maintain and develop their u3a community:

*Since December we have offered a virtual Coffee Morning to our members, which centres around a theme and includes PowerPoint presentations, contributions from groups and a 'break-out' session for a social chat. We have realised that this works better if we facilitate a specific topic or question. We aim to put on a programme of professional entertainment once a month via Zoom. Our main focus of attention has been on making our website more creative, attractive and interesting both for existing and potential new members. Matlock and District u3a*

*Twice-monthly Speaker Meetings continued. Attendance is continuing to increase from 40+ to nearly 100. Fortnightly coffee mornings set up on Zoom alternate with Speaker Meetings. Breakout Rooms are used for chats. Brief film/comedy clips start coffee mornings as stimulus for conversation if needed. Some members only want to be with their friends in Breakout Rooms but we have resisted this and encourage them to meet other members. Witney u3a*

*Our monthly open meetings with guest speakers re-started in October using Zoom and about half of our 22 interest groups also met using Zoom. Allowing member-to-member chat time before and after speaker meetings is much appreciated.....we have recently started a second*

*series of monthly meetings (talks/quizzes and presentations) as well as regular tea/cake/chat sessions. The use of breakout rooms allowing team quizzes has extra appeal to our members. We've also started monthly 'themed' photo competitions with small 'liquid' prizes including an intriguing one which features photos of specific parts of local buildings where there is no background to provide clues to the location! Penicuik u3a*

*For some months we've produced a monthly YouTube video, an upbeat coverage of Hillingdon u3a developments, with a link sent to all online members..... A number of Groups are running virtual meetings via varying platforms, particularly Zoom. Group meetings are open to all local u3a members, and we encourage group members to invite their friends to attend.*

*Zoom meetings mean that Interest Group business can continue to be effective. We continue to promote more Groups to undertake virtual meetings, using positive examples from our own u3a, or other u3as if we need to. As examples, our Family History Group is in process to run its first Zoom meeting, following the success of the first such meeting of the Local History Group, which attracted around 70 participants when historically only around 25 participated in the earlier in-hall meetings! Hillingdon u3a*

Below is just a small selection of ideas gathered first hand and from the u3a *Keeping in touch* Facebook group:

- **Carlton and Gedling u3a** jazzed up its wine tasting group calling it their u3a wine bar, inviting the whole membership, using break out rooms and adding YouTube clips for educational content and conversation, their new motto is 'learn through drinking'
- A walking group buddy scheme whereby members go for walks in pairs has kept **Sherburn and Villages** u3a in touch
- **Ashburton u3a** gardening group have begun using WhatsApp to share images of plants, to share produce and plants and to organise staggered visits at hourly intervals to members' gardens through the seasons.
- History and photography groups prepared local quizzes to be used when members are out exercising.
- Family history groups have started to share their research images of Birth Marriage and Death records in dedicated Facebook groups, for supportive commenting, which works better than in a normal face-to-face gathering.
- Photography groups have used Flickr to share with their group members
- A beginners' drawing group launched using YouTube videos and zoom
- A new craft group began sharing members projects on WhatsApp, meeting on zoom and when allowed have workshops to demonstrate and practice new crafts.

## **Technical support and help**

To take advantage of all of the opportunities of digital, u3as have required a great deal of new learning, technical support and help. To retain members and include them in activities, committee members and volunteers who have learnt how to use Zoom, WhatsApp, YouTube, Facebook and other types of social media, have taught others in the true u3a ethos.

u3as have found that attitudes have changed towards technology. It may be a second-best, compared to face-to-face, yet it is an effective way to keep in touch and pursue interests.

Individual u3as progress with technology at very different rates, dependent on their members' proficiency and how many gurus and helpers they can enlist. However, observations from lockdown surveys in the South West region taken in March 2020 and then in December showed progress made in use of technology was staggering, thanks to hundreds of enthusiasts helping others to gain confidence and try out new things.

This self-help ethos is echoed in other regions. In the East Midlands, for example:

*A member of the Committee has undertaken 1:1 training in the use of Zoom for those nervous of technology. A member of the Committee has contacted and supported 'group contacts' to keep in touch with their specific interest group members, and has assisted with and supported the use of Zoom skills, where necessary. Members of the Committee have planned and delivered 'newbie' user and 'etiquette' Zoom sessions....The Committee has requested that any members who have expertise in internet / web-based publicity, become involved, where practicable." **Eastwood u3a***

In Ledbury and District u3a, in the West Midlands:

*We have a significant number of members with no IT, many of whom have taken the decision not to travel down this path. Consequently, the sub-group has included in its remit the development a buddy system - to facilitate the use of email communication (in particular), without disenfranchising any of its members. Buddies (further non-committee members) will disseminate email information by phone or as hard copies. As we progress with online engagement, will also aim to develop existing telephone groups (via buddies & existing/new groups), and to explore telephone zoom dial-in.*

In Tunbridge Wells u3a in the South East Region:

*We invited those who had joined since September 2019 to a virtual New Members' Meeting. First we had to introduce many of them to Zoom, itself a time-consuming process, but the meeting itself was a success. We were able to introduce some of the members to groups but the obvious need was for social contact. As a result, we have set up the New Zoomers group (**New** members who are **Zoom** users). They have been meeting once a week for a chat over coffee or drinks and want to continue, though we are gradually integrating them into mainstream activities.*

In Plymouth u3a, the committee agreed to the compilation of a help video about downloading and using Zoom. This has meant that many members can communicate better with friends and family and within some groups.

In Exmouth u3a, the committee set up a sub group: a Technical Committee. This new committee investigated different systems and how it could help both the committee but importantly the membership of around 1000 members. Over the course of the Lockdown and the easing of restrictions the Technical Committee has helped over 75 individual members with technical issues, mostly by phone call.

### **Subscription and payment issues**

Broadly speaking, encouraging membership renewal has two payment aspects:

- Reduction of subscriptions
- Making it easier to pay remotely.

Subscriptions are obviously a sensitive issue for each committee. Some u3as have maintained subscriptions at their normal, pre-covid level. Others have reduced subscriptions temporarily or introduced subscription holidays to compensate members for the loss of their normal full range of membership activities and/or in recognition of the reduction in u3a running costs in the absence of venue charges.

Whatever the decision on levels of subscription, u3as have moved to, or are speeding up the transition to, remote payment of subscriptions either online through bank transfer or PayPal, or through postal payment.

### **Surveys, consultation and canvassing for new ideas**

Last, but by no means least, in the truly unprecedented circumstances of the pandemic, some committees have recognised the need to consult with members for ideas about how to keep their groups running, using surveys or questionnaires based on models provided by SurveyMonkey or developing their own. Indeed, there have been several requests on the Keeping in Touch Facebook group for examples of effective practice to help u3as who want to try and gather feedback and information from members, but don't know how to get started.

Seeking feedback can be incorporated as a regular committee action. The benefits are that it provides material for the committee to use for running their u3a, values members' views, encourages member involvement and discourages a culture whereby members are passive receivers who feel they can opt in and out of the u3a without commitment.

Some of the Pathfinder u3as are seeking to gather and respond to members' views.

To quote the Chairman of Plymouth u3a, by way of illustration:

*The first step in the recruitment review was, I felt, down to me as Chairman. My initial action was to contact all members who joined our u3a in the past 9 months or so and asked them what their first impressions were and how they felt we could improve things. Responses were very positive and as a result two of those people agreed to join three members of the committee to form a 'recruitment sub-committee'.*

Tunbridge Wells u3a has chosen the survey route to gather feedback from members:

*We decided to find out more about our members by circulating an online questionnaire. Committee members held very different views about what should be included but eventually we agreed and the survey went out before Christmas.*

### **Conclusion**

It seems self-evident that u3as will want their members to renew their membership.

The pressures of successive lockdowns and the disruption of our normal public meetings are having an impact on renewals.

Some u3as have apparently been disheartened by this and, feeling that there is little they can do about it, are anticipating a significant loss of members.

The experiences of u3as which are summarized and discussed in this guide suggest that there is a lot you can do to strengthen your u3a right now in order to retain your current members and to keep providing opportunities to learn and laugh together for a richer life.