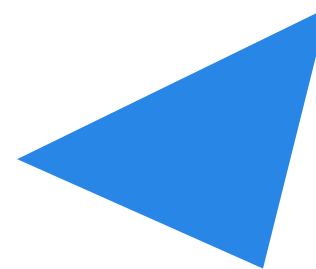




Planning your u3a recruitment project

Developing a marketing plan to recruit new members



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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 also suggests how you might develop a plan to “relaunch” your u3a, post-Covid.

The purpose of the guide is to suggest how you can develop a simple and robust plan.

Your experiences of using the guide are of vital importance. Please keep a note of your suggestions for improvement and send them to feedback@u3a.org.uk

INTRODUCTION 2

This guide is in a PowerPoint format in case you want to work through it as a group.

You will find some worked examples of a Strengths/Weaknesses/Opportunities/Threats (SWOT) analysis, analysis of your target audience, where to advertise, ideas for publicity, action log and planning.

Some of this planning can be carried out by your recruitment team. You might want to involve your whole u3a in some aspects.



1 Assemble your team

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Assemble your recruitment team; how will it operate?

Who's in the core team? Need at least 3, max 10?

What are your strengths? What do you like doing?

How will you operate – *via Zoom?*

How often will you meet – *weekly? Time?*

Beyond the core team, how will you involve people in our u3a?

You might need:

- a “scribe” to record people’s skills and interests, update the plan
- a “secretary” to call the meetings, send reminders and information
- somewhere to store your information
- people good at writing/photography/graphics/digital etc.

**2 Agree your objectives: what
do you want to achieve?**

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Example objectives

- **Recruit 100 new members during 2020/21 (is this realistic?)**
- **Retain at least 95% of current members**
- **Set up an effective system for recruitment of new members**



3 Strengths, weaknesses, opportunities and threats

SWOT: WORKED EXAMPLE

OUR STRENGTHS

We are well organised

We have some unique selling points

It's cheap to join and excellent value for money

We have some great groups that operate online

OUR WEAKNESSES *(can be overcome)*

We can't meet in person

We will lose members even post-covid

Many of our interest groups are not meeting

Our monthly meetings are suspended

OUR OPPORTUNITIES

We and our target market are getting much better at doing things on line

A lot of people in our target market are leaving full time work and may be looking for a new focus

THREATS TO OUR SUCCESS

Potential members may be more attracted to other volunteering activities

We might only attract people who can communicate online

4 Who is our target audience?

Where do we find them?

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Who and where are our target audience?

Who?

- People who have recently left full time work.
- People in our community who are not currently well represented in our u3a.
- Members of faith groups; members of other community organisations
- People with specific learning or leisure interests

Where?

- Where do such people go and meet; how could they find out about u3a?
- Where do they regularly visit, e.g. supermarkets, surgeries?
- What sort of social media do they use?
- What sort of media channels or newsletters do they use/receive?
- How did our current members find out about us?

How can we reach our target audience?

Through other organisations	Through publications/websites	Other channels?
Round Table	Parish magazines/websites	Promoting a specific interest group at a key location e.g. at a garden centre for gardening groups
Women's Institute	Local radio	
Residents' Associations	Facebook, Nextdoor	Health centres, hospitals etc Retirement Centres
Age UK	Facebook adverts	Libraries, museum, art gallery
Lions	Community websites	Local clubs
Sports clubs	Supermarket notice boards	Retirement homes/villages
Faith groups	Local newspapers/periodicals	Theatre, cinema
Health clubs	Relevant local newsletters	Pop up stall in a local supermarket?

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Ideas for publicity –

list everyone's ideas: what will interest our target audience?

.....**Some examples**

- Deliver u3a leaflets and deliver to streets with target demographic
- Get our local MP to record a message about u3a that we can play as an advert on our Facebook site
- Using Facebook Ads.
- Setting up a gift membership which could be bought, say, by children for a parent or on retirement

In normal times, you might record each idea on a “post-it” note on the wall – these days someone needs to record the ideas and send them all out for the team to look at.

You need to prioritise them and assign owners to investigate them.

By your second or third meeting you should have more insight into the practicalities of various ideas – e.g. their cost, timescale, level of difficulty and their likely impact.

5 Developing your plan

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Create an Action Log : what will we do each week?
at this stage you are investigating options before you
commit to them.

TASK (WHAT?)	WHO?	BY WHEN?	MIGHT IT WORK?
Gift membership	VB		
Devise 3 articles for publication	CH		
Attract new members to our social media	AM		
Find a local personality who may help	CC		
Find out how much it costs to advertise on Facebook	ABB		



Your plan: *once the preliminary investigation is over...*

What will you do?	When?	Who will lead?	Who will help?	What do you need to do it? (e.g. budget) What is the "lead time" on this?

N.B. u3a brand guidance and branded materials are available via the u3a Brand Centre

Good luck!

Send your feedback on this guide
to feedback@u3a.org.uk

Monitoring & Evaluating Your Project



u3as have been sharing ideas with each other and coming up with resources to help the movement retain and recruit members during this time and beyond. This series hosts these resources in a toolkit for u3a members to use when needed. Credit: Paul Martinez

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 three main things:

- Clarify what you want to achieve and how you will measure success
- Identify any changes you need to make as you implement your recruitment project
- 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.

Table 1: Evaluation measure for recruitment project: worked example

Type of Measure	Specific Measure	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	<p>Estimated numbers of visitors to a pop-up stall</p> <p>Responses to different sorts of online promotion e.g. to Facebook adverts, responses to your Facebook page; gifts of membership subscription on any online platform</p> <p>Visits to your website. Visits to a particular interest group page on your website if you have been promoting that group.</p> <p>Responses to your letters and phone calls to local influencers.</p>
Conversion Rates	% of first contacts which convert into new members	<p>% of online contacts and visitors which convert to members (from enrolment questionnaire)</p> <p>% of visits to pop up (and similar activities) which convert to new members (from enrolment questionnaire)</p> <p>visitors to your website who convert to new members (from your enrolment questionnaire.)</p>
Increased membership	Number of new members	Number of new members from enrolment data
Increased recruitment of members with particular characteristics	Number of new members of a particular type – age, sex, ethnicity, etc.	<p>Number of new members using postcode as a proxy from enrolment data</p> <p>Age or ethnicity of new members – this is likely to be a guess unless you collect such data through your enrolment processes</p>
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've chosen
	What types of promotion worked least well?	Quantitative assessment using measures you have chosen
	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?	Qualitative assessment from discussion in your core recruitment team
	Is anything missing from the recruitment toolkit?	Qualitative assessment from discussion in your core recruitment team
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