

## **SHARED PRACTICE GUIDE 06** **WELCOME AND INDUCTION OF NEW MEMBERS**

**Rev 01**

### **Introduction**

A Shared Practice Guide (SPG) is a vehicle to share knowledge between the U3As in the London area. They are created by pulling knowledge and experiences from those U3As. They are only a guide – what worked for one U3A might not work for your U3A. If in your experience you have something different to offer or something to add, please write to us with your suggestions. It's hoped these Guides will grow over time with more shared experiences.

### **Scope**

This particular SPG addresses a key issue for all U3As – how best to welcome and integrate new members into a U3A. All U3As lose some new members after just one year – and one of the reasons given for this is that they didn't feel welcome or fit into the U3A. This SPG provides ideas and activities on how to welcome them, integrate them and give them an induction into your U3A's activities and the U3A ethos.

### **Background**

This SPG captures some ideas and practices suggested at the January 2020 Delegates meeting of the London Region of U3As (LRU3A). It is hoped other experiences will be expressed and captured here in updated versions.

### **Learnings**

Of course, it's easy to have the idea - the hard bit is the application of the idea. Many of the London U3As had tried similar things for integration of new members. But some had more success than others in the application. Appendix 1 offers a list of ideas that have been tried by some U3As collected under headings and objectives. But there is no step by step prescribed procedure. Individual U3As will need to consider which of these methods is appropriate for them – and decide how they are going to apply them.

### **Reference Material**

Whilst there is guidance on The Third Age Trust's website relating to the induction of Trustees (Committee Members), there is currently none relating to the welcome and induction of new members.

### **Contact Point**

If you have any queries, comments, or additional suggestions please email [MembershipSec.londonregionu3a@gmail.com](mailto:MembershipSec.londonregionu3a@gmail.com) and one of the LRU3A Committee will deal with them.

**APPENDIX 1 –OBJECTIVES AND IDEAS**

	<b>OBJECTIVE</b>	<b>IDEAS</b>
<b>1.</b>	<b>Initial Enquiry and/or Visit (prior to joining)</b>	
1.1.	Friendly Welcome	<ul style="list-style-type: none"> <li>○ have open monthly meetings with meeter/greeters to provide an introduction to U3A (newcomers can come once or twice only due to insurance)</li> <li>○ have a committee member available to chat to them and make sure they are served a tea/coffee</li> </ul>
1.2.	Mini Welcome Pack	<ul style="list-style-type: none"> <li>○ standard leaflet</li> <li>○ listing of current Interest Groups</li> </ul>
<b>2.</b>	<b>Joining at Monthly Meeting</b>	
2.1.	Friendly Welcome	<ul style="list-style-type: none"> <li>○ U3A sashes for meeter/greeters so they are easily identified</li> </ul>
2.2.	U3A Principles	<ul style="list-style-type: none"> <li>○ emphasise the U3A Objectives &amp; Principles and ethos from the beginning</li> </ul>
2.3.	Welcome Pack	<ul style="list-style-type: none"> <li>○ provide a Welcome Pack.</li> <li>○ this can vary from a 'Welcome Letter', 'Leaflets', to larger 'Handbooks' and to a composite pack of several documents. (see Appendix 3 for sample index of a Welcome Pack)</li> <li>○ one inclusion should be details of current Interest Groups.</li> </ul>
2.4.	Introductions	<ul style="list-style-type: none"> <li>○ put them in contact with Group Convenor or Groups Co-ordinator if they have interest in particular Group (Groups Coordinator to explain what to do if group doesn't yet exist)</li> <li>○ demonstrate the U3A's website</li> <li>○ talk about national and regional U3A events and activities</li> <li>○ show copy of TAM and promote it</li> <li>○ at monthly meetings, set up a PowerPoint presentation of forthcoming events/help needed etc</li> <li>○ get everyone at monthly meetings to say "hello" to the person sitting next to them</li> </ul>
2.5.	Application Form	<ul style="list-style-type: none"> <li>○ use Application Form to manage expectations before people join U3A (e.g. about U3A ethos of shared learning and volunteering) and to gather information about how they heard of U3A, why they joined, about their experience &amp; interests, special needs</li> </ul>
<b>3.</b>	<b>Follow-up</b>	
3.1.	Individual Contact	<ul style="list-style-type: none"> <li>○ on receipt of membership subscription from a new member, some form of welcome communication should be sent to them (see Appendix 2 for example). This can be sent out automatically by email, through Beacon or manually by post.</li> <li>○ membership card to be sent with a welcome letter and welcome pack and invitation to the next New Members Meeting</li> <li>○ follow up all new members with personal telephone call; talk to them at monthly meetings</li> </ul>

	<b>OBJECTIVE</b>	<b>IDEAS</b>
		<ul style="list-style-type: none"> <li>○ talk through the content of the Welcome pack &amp; any questions</li> <li>○ help them with their "Wish list" – did they manage to join the Groups they wanted to?</li> <li>○ consider assigning a buddy to each new member</li> <li>○ formation of bonding groups e.g. 'The Year Group of 2020'</li> <li>○ welcome new members in monthly newsletter and at monthly meetings</li> <li>○ consider sending (anonymised) questionnaire after about 12 months to find out about further needs, preferences, expectations, recommendations etc.</li> </ul>
3.2.	New Members Meeting	<ul style="list-style-type: none"> <li>○ coffee morning, wine &amp; cheese, or meet in restaurant/pub; to be held every one or two months; keep things informal and friendly</li> <li>○ send a reminder about New Members Meeting; + invitation to 'bring your friends'. If held in a public place, this provides publicity</li> <li>○ invite Group Convenors, especially if they have spaces &amp; want to recruit</li> <li>○ discuss their intentions in joining the U3A</li> <li>○ what they might contribute - their skills, interests, etc.</li> <li>○ ideas and available support for setting up an interest group</li> <li>○ follow up meeting (say 6 months) to see if their needs are met talk about the wide range of U3A learning opportunities including Short Courses, Shared Learning Projects, Study Days, Summer Schools</li> <li>○ talk about Third Age Trust: demonstrate website, subscription to National News Email, Sources Online, Resources Centre</li> <li>○ briefly explain structure &amp; relationship of the wider U3A: Third Age Trust, National Office (not Head Office), Regions, Networks</li> <li>○ consider Lunch/Tea for the Year Group (after 1yr) - invite speakers (e.g. Regional Trustee/LRU3A) to talk about U3A overall structure/ developments/general statistics/ Trust Volunteers &amp; other support/ opportunities 'Getting the best out of the wider U3A'</li> </ul>
<b>4.</b>	<b>Make it Easy to Join In</b>	
4.1.	Manage waiting lists	<ul style="list-style-type: none"> <li>○ get the waiting group together to discuss what they would like the group to do and then persuade one or two of them to facilitate if they want the group to exist</li> </ul>
4.2.	Interest Groups	<ul style="list-style-type: none"> <li>○ Groups Coordinator to talk at monthly meetings about new interest groups plus groups with spaces; also provide this information in Newsletters, website and social media</li> </ul>

## **APPENDIX 2 – SAMPLE WELCOME COMMUNICATION**

**Dear .....**

Welcome to .....U3A and thank you for your membership application form and payment.

There are Monthly Meetings, around 80 interest groups, outings and other social events for you to choose from. Your membership is valid immediately so you can now attend any of our activities and you can also apply to join any interest groups.

### **Membership**

Your membership number is ....., and your membership card is attached. Please also find enclosed a copy of our Members Handbook.

### **“It All Depends on Us”**

Our U3A is run by its members for its members. All the group coordinators and Executive Committee members are volunteers and we welcome more members becoming actively involved in developing our activities.

Do let us have your comments, ideas and suggestions – and constructive criticism; if there is anything you are unhappy about our U3A, or you have a complaint, please get in touch.

### **The ‘Beacon’ Membership System**

Now that you are a member of ..... U3A, you can access Beacon, which is our members' database. In it you can see all our groups and events. Your personal data is securely stored there as well. For security reasons you need to log in to Beacon. You can go through the 'Members' page of our website (.....). To log in you need to enter the following data exactly as it is set out here. Please note that names are case sensitive. You might also find it helpful to keep these precise details of your log-in data handy for future reference.

- Membership Number
- Forename
- Surname
- Postcode
- email address

Then click on the 'Confirm Identity' button. Once into the database please check and correct, if necessary, your personal contact details which include addresses, telephone numbers, email addresses and emergency contact information. Whenever your information changes, it is important that you log-on to Beacon and update your personal data.

In Beacon you can:

- View and/or download a personal calendar, showing your group meetings and our U3A's Monthly Meetings as well as coffee morning and pub lunch dates.
- See the contact details for group coordinators.
- Enrol in a group online, providing the group coordinator allows this to be done.

## **Our Website**

Do look at our website, ..... which opens at the Home page, and has up to date information on all groups, activities, Monthly Meetings, open meetings, outings and much more.

On each page of our website you can see the menu sections printed in a blue line above the photos. By clicking on the menu item you can see the information you need. For example – clicking on “What’s on” you will see dates and speakers for the Monthly Meeting, as well as many other activities.

Clicking on “Groups” you will see the full list of groups running. Click on the group you’re interested in and you’ll get more information. At the bottom of the page click on “Timetable”, and you will find the link to the Indicative Groups timetable - this shows the monthly timetable for all groups. (This is not updated regularly, so sometimes you will have to check with the group co-ordinator).

Clicking on “News” you will see what some of the groups have been doing. You can also read the latest Newsletter, and the latest Bulletin. The Bulletin will be emailed to you at the beginning of the month, and is updated during the month for you to read on the “News” page.

## **Contact**

You will receive in the post a copy of our [quarterly] Newsletters.

If you have been able to provide us with an email address you will receive weekly emails about whats happening at ..... U3A [and monthly emails with other relevant news]

If you have any questions, please do not hesitate to contact me by email at this address ..... or call .....

With best wishes

.....  
Membership Secretary

## **APPENDIX 3 – SAMPLE INDEX FOR A NEW MEMBERS WELCOME PACK**

### Contents

1. Welcome to ..... U3A
2. U3A Membership Benefits
3. Brief history of the U3A movement and your U3A
4. Basic structure of U3A (Trust/National Office/regions/networks) plus a few basic stats
5. Guidelines for U3A Members - how to contribute; to volunteer and participate
6. Information about Interest Groups (see Appendix for list of Groups)
  - How to join an Interest Group
  - Notes on attending an Interest Group meeting or activity
  - Starting a New Group
7. Information about up-coming Shared Learning Projects in ..... U3A or in the region
8. Information about upcoming Events
  - ..... U3A Monthly Meetings, Social events, etc.
  - London Region events - Summer School, etc.
  - National U3A events in our area
9. Information about up-coming Trips and Outings
10. Executive Committee; who's who in your U3A
11. Communication Methods
  - ..... U3A Website
  - Third Age Trust and LRU3A Websites
  - Mass email service (MES)
  - Newsletter (see Appendix for example newsletter)
12. Beacon Membership System
13. Data Security and other policies
14. Welcome gift(s) e.g. pen/pencil/notebook/bookmark/bag, etc

### Appendix

- a) List of Groups
- b) Latest Newsletter