

# **Three R's for HCE: Revive, Rejuvenate, & Recruit**

## **A Learning Package**

1997

## Introduction

### Available for checkout from:

Oklahoma Cooperative Extension Service  
OHCE State Advisor  
135 Human Sciences Building  
Oklahoma State University  
Stillwater, OK 74078-6111  
(405) 744-6280

### Description/Length:

**Description:** This material is appropriate for teaching OHCE lesson leaders (and for the leader lesson) or special interest workshop. The target audience is OHCE members and officers. The presentation includes the following concepts:

- reasons why people join groups
- understanding the OHCE organization to sell it effectively (its purpose, future plans, accomplishments, etc.)
- the barriers/hindrances to joining OHCE; what the organization and individual members can do about them
- strategies to recruit new members
- developing a Plan of Action to recruit new members

**Length:** For OHCE leader training or special interest workshop (including an OHCE officer and/or Membership Committee orientation or project meeting) 60-90 minutes  
Leader lesson at an OHCE group meeting 20-30 minutes

### Objective:

As a result of participation in the "Three R's for OHCE: Revive, Rejuvenate, and Recruit" session, participants will learn recruitment skills and develop a Plan of Action to recruit new members.

### Materials: (Resources/References)

#### Materials provided with this package:

- Instructor's Outline (for the OCES professional)
- Master copies of the following handouts:
  - Guide for Lesson Leaders
  - 5-Card Shuffle: A Little Magic in Recruiting New Members
  - Our Plan of Action to Recruit New Members
  - Creative Ideas to Recruit New Members
  - Tips for Mailed Nominations/Invitations to Join OHCE
- Overhead transparencies:
  - Objectives for Today's Session
  - Reasons Why People Join Groups
  - Understand OHCE to Sell It Effectively
  - Who Are Prospective Members?
  - 5-card Shuffle
  - Creative Ideas to Recruit New Members
  - Plan of Action (form)

(more)

**Materials you need to provide:**

- Examples of member recruitment items (from OHCE or other organizations), such as brochures, mailed or personally delivered invitations to join, membership campaign outlines, member recruitment newspaper ads and articles, scripts for telephone member recruitment, etc.
- pencils or pens for participants
- per participant: five slips of scrap paper or index cards (about 3” x 5”) for the “5-Card Shuffle” activity
- per participant: one half sheet of note paper for the “5-Card Shuffle” activity
- copies of handouts from the masters provided with this package:

1/lesson leader	Guide for Lesson Leaders
1/lesson leader	5-Card Shuffle: A Little Magic in Recruiting New Members
1/member	Our Plan of Action to Recruit New Members
“	Creative Ideas to Recruit New Members
“	Tips for Mailed Nominations/Invitations to Join OHCE
- overhead projector and screen

**Evaluation:**

Evaluate this lesson by documenting the recruitment strategies that OHCE members implement in the coming weeks and months at the group and/or county level. Look for the following indicators:

- How many OHCE groups prepared usable Plans of Action? County OHCE level?
- How many implemented their Plans of Action?
- What kinds of recruitment strategies did they use?
- What resulted? Growth in new membership? If so, how much?
- What strategies worked the best?
- How do the OHCE members feel about their efforts?

# **Instructor's Outline**

## **(for the Extension professional)**

**Objectives** **Overhead**

**Reasons Why People Join Groups** **Overhead**

**Understand OHCE to Sell It Effectively** **Overhead**

Ask people attending the session to describe what should go under each of the three categories, then record what they say. Keep the discussion on track and be prepared to fill in important points they may overlook.

**Who Are Prospective Members?** **Overhead  
or easel pad**

Get people to suggest categories of prospective members using a Nerf ball. Start by tossing the ball to someone in the group and have him/her suggest a category (such as: spouses of current members, lapsed members, newlyweds, new retirees, etc.). Then that person throws the ball to another person who names another category of prospective members. Write their suggestions on the overhead transparency or on an easel pad. Continue till you have a useful list. Be prepared to name important categories they may overlook.

**5-card shuffle** **Overhead**

Conduct the activity according to the instructions on "The 5-Card Shuffle" handout. Refer the participants to the brief instructions on the overhead to get them started, then turn the projector off when they break into small groups.

**Creative Ideas** **Overhead  
& handout**

Distribute the "Creative Ideas" handout and lead participants in a discussion of the various methods (the handout coincides with the categories on the overhead).

**Tips for Mailed Nominations** **Handout**

Distribute the handout and lead participants in a discussion.

**Plan of Action To Recruit New Members (form)** **Overhead  
& handout**

Do a sample plan with the group. Write on the transparency as you lead the participants through the process of developing a Plan of Action.

### **FOR LEADER TRAINING:**

Review the Guide for Lesson Leaders and other materials in the packet you've prepared for each OHCE group lesson leader. Pay particular attention to instructions for each group to complete and implement the "Plan of Action to Recruit New Members" form.

Review the evaluation for the lesson.

# **Objectives for Today's Session**

**As a result of today's session, you will be able to:**

- **Use member recruitment strategies**
- **Turn barriers into recruitment opportunities.**
- **Develop & Use an action plan to recruit members at the group or county level.**

# **Reasons Why People Join Groups**

- \* Acceptance**
- \* Friendships**
- \* Responsibility & authority**
- \* Personal interests**
- \* Vocational interests**
- \* Social gathering**
- \* Development of skills**
- \* Recognition**
- \* Prestige**

# Understand OHCE to **Sell** It Effectively

- OHCE's purpose
- OHCE's accomplishments
- OHCE's future plans

# **Who Are Prospective Members?**



# 5-Card Shuffle

## 1. On one slip of paper:

Make a simple drawing of a “Prospective Member”.

## 2. On the other four slips:

On each slip write one barrier or hindrance that might keep that “Prospective Member” from joining OHCE.

# *Creative* Ideas to Recruit New Members

- **Nomination package**
- **Trial memberships**
- **Involvement devices**
- **Member-get-a-member campaigns**
- **Brochures in public places**
- **Publicity**
- **Gift memberships**
- **Gift certificates**
- **Others**

# Guide for Lesson Leaders

Enclosed are the materials for your lesson “The Three R’s of OHCE: Revive, Rejuvenate, and Recruit”. The contents include your instruction sheet for the “5-Card Shuffle” and the following handouts for each member:

- Creative Ideas to Recruit New Members
- Tips for Mailed Nominations/Invitations to Join OHCE
- Our Plan of Action to Recruit New Members

You need to provide the following:

- Pencils or pens for each member
- five 3x5 index cards or five scraps of paper about that size for each member
- Sheets of scrap paper or newsprint paper

Also, collect **examples of member recruitment strategies used by other organizations** and bring them to the lesson. Watch the newspaper and mail for news stories, ads, letters, brochures and techniques that you find effective. You can also find examples in the direct mail advertisers, flyers, and requests for donations that come in the mail at home or at work--while they may not be member recruitment, they are asking you to take some sort of action and can serve as good examples.

**Before the lesson.** Work through the “5-Card Shuffle” activity. Review the other two handouts and think about how your OHCE group or county organization could use those ideas to recruit. Draft three or more strategies for the plan of action to recruit new members to jump-start the group at the meeting.

**At the lesson.** Begin with the “5-Card Shuffle” activity. The group will be talking about hindrances and barriers, so keep the discussion on a positive note--focus on what they can do to remove those barriers and make it possible to someone to be an active member.

Hand out “Creative Ideas to Recruit New Members” and “Tips for Mailed Nominations/Invitations to Join”. Have the members review and discuss the ideas listed. Possible idea: divide members into small groups of 4-5 people and have each group devote their attention to a certain part of the handout. Challenge them to select the strategies they would commit to do.

Hand out “Our Plan of Action to Recruit New Members”. Have the group complete one form together.

**After the lesson.** Make a copy of your OHCE group’s completed Plan of Action for every member in your group, as well as the county president, county membership chair, and the Extension Educator.

**At each monthly meeting through the duration of the Plan of Action.** Check your OHCE group’s progress in following through on their Plan of Action. Examine which ideas are working and which are not, and determine what needs to be done to make those ideas work. Maybe your group could use some help from the state or county Membership Committee or officers--if so, get the help you need.

**Evaluation.** Evaluate this lesson by documenting the recruitment strategies that your OHCE group implements in the coming weeks and months. Look for the following:

- How did your group implement its Plan of Action? What recruitment strategies did you use?
- What was the growth in membership for your OHCE group?
- What strategies worked the best?
- How do the OHCE members feel about their efforts?

Prepare a brief one-page report on the above items and submit it to the County President and the County Extension Educator.

# The 5-Card Shuffle:

## A Little **Magic** in Recruiting New Members

### Purpose of the activity:

Members will think about potential new members, the barriers or hindrances that may keep them from joining, and what the members themselves can do to overcome those barriers.

**Time required:** 15-20 minutes (allow more time with groups of 30 or more)

### Items needed:

- Each person needs five 3x5 index cards or scraps of paper about that size.
- Pen or pencil for each person.
- One sheet of typing or notebook paper per small group

### Instructions:

- Have each person make a simple drawing of a Potential Member on one of their cards. 3 minutes
- On each of the other four cards, have each person write a hindrance or barrier that might keep a person from joining.
- Break the total group into small groups of four to five persons. Have them share and discuss the hindrances or barriers they've written on their four cards, then have them identify things that could be done to remove those barriers. Ask one person in each small group to record the group's ideas. 5-7 minutes
- Ask each group's recorder to report briefly what the group discussed. 5-7 minutes
- Now for the magic! (People may stay in their small groups or return to their original seats). Say the following: 2 minutes
  - We're going to do a little magic now and let's see what happens to your cards. Start by putting your five cards face up in a row with the Potential Member card at the far left.
  - Now, exchange the Potential Member card with the card to its right.
  - Now I want you to move the Potential Member card again by exchanging it with the card to its right **OR** to its left--whichever direction you choose.
  - Move the Potential Member card a third time exchanging it with the card to its right **OR** left.
  - Now, move your hand over the five cards and let it come to rest over the card on the **FAR LEFT**, pick up the card, wad it up and toss it out--you've removed one barrier for that potential member.
  - Ready to move the cards some more? Exchange your Potential Member card with the card to its left or right--whichever you choose.
  - Now, exchange the Potential Member card again with the card to its left or right.
  - Exchange it a third time with the card to its left or right.
  - Let your hand float gently over the four cards, then come to rest over the card to the **FAR LEFT**. Wad it up and toss it out. Once again, you've removed another barrier to joining the organization.[Note: there should be three cards left].
  - Exchange the Potential Member card one more time with the card to its left or right.
  - Wave your hand over the remaining three cards and let it come to rest, but this time on the card on the **FAR RIGHT**. Wad it up, toss it out, and remove another barrier to joining.
  - Let your hand wander gently above the last two remaining cards, then drop down on the card on the **FAR LEFT** and toss it out. Your Potential Member card should be the only one left, and that's where the focus of this session belongs.

## Creative Ideas to Recruit New Members

- **Nomination package.** Mail an announcement that the prospective member has been nominated for membership by a current member. The announcement can be prepared in letter or invitation form with a formal, prestigious look or a casual, informal appearance. Include information on becoming a member, such as a brochure and application.

A variation is the **nomination campaign**, where current members nominate prospective members. The nominees receive a letter of invitation from the OHCE president (state, county, or group president--your choice) informing them of their nomination and offering them a special opportunity to join, often at a reduced rate or with a special gift for joining. Usually current members are given a small gift for providing names.

- **Trial membership package.** Offer a short-term membership. Delay requesting a dues payment until after the trial membership has begun, at which time a series of invoices is sent to the new member.
- **Involvement devices, such as a survey or petition package.** Prepare a survey or petition package to recruit new members by asking for their opinion and/or help in promoting a specific cause of importance to your county OHCE organization, such as healthy families, family financial well-being, healthy children, etc. Invite people to “tell what they think!” ***and*** join OHCE to make a difference concerning that issue. Distribute by mail or person-to-person (perhaps at a booth at a local shopping area, the county fair, a health fair, parents fair, or other event where potential members will gather). Include a membership brochure and application. As an added bonus, tabulate the responses to determine if the results create a newsworthy story of interest to your local newspaper and radio station.
- **Member-get-a-member campaigns.** Have a contest to see who will bring in the highest number of new members, and offer a reward to the winner.

This idea was very successful for the McCurtain County OHCE in 1996, reports Donna Head, the county president, increasing their membership from 53 to about 80-85 members. She challenged the members to a recruitment contest saying that she could recruit more new members than all the rest of them together. If she won, each OHCE group committed to donate \$50 to her favorite charities: OHCE and the Red Cross. If she lost, the OHCE members would cover her with whipped cream and march her through the livestock pavilion during the county fair. She lost by three members, but the spectacle of Donna covered with whipped cream attracted about 200 fair-goers, news coverage, ***and three more new members.***

Tips to successful campaigns:

- Provide a fun, competitive environment.
- Provide members with appropriate information about OHCE to avoid understating or overstating what OHCE offers. Understating may lead to persons not joining OHCE because they did not fully understand OHCE’s benefits and services; overstating may lead to dissatisfied new members who do not renew if members overstate OHCE’s benefits and services for the sake of meeting a quota.
- Prepare members for how to respond to objections raised by prospective members regarding why they might not join.
- **Brochures in racks at stores and other public places.** Place “take one” brochures in racks at places where prospective members go. To reach **young parents** (and **grandparents**, too!), place brochures in infants and children’s stores. Perhaps the owner would even have clerks put brochures in the customers’ sacks. And remember child care centers, too! **Young women and young couples** could be reached at places such as pre-marriage counseling at churches, bridal stores, florists, and stores/departments where engaged couples register for household goods. **Adults of all ages** will see OHCE brochure racks when they spend time at:
  - waiting rooms/lobbies at medical/dental/professional offices and government agencies (such as county health departments, tag agencies, Social Security offices, the department of human services, etc.)
  - libraries
  - schools and vo-techs

Choose your venue carefully, with an aim at “narrow-casting,” not broadcasting.

- **Public relations and publicity** can bring in new members; however, they usually do so indirectly and are vital in supporting other membership recruitment methods such as the nomination package and campaign. The more OHCE's name is heard and its reputation is known, the more likely people will be to respond to its membership solicitations positively.
- **Gift memberships** can be extremely in gaining new members. They are easy to sell in a newsletter, newspaper, or simple special mailing; they are inexpensive to process and fulfill; and, best of all, they are usually renewed at a very high rate. Keep accurate records on donor and recipient information--previous donors may renew the future membership for the recipient and would need to be contacted when it's time to renew.
- **\$5 OHCE gift certificates** that can be applied toward membership dues are effective in recruiting and retaining members. Give them as wedding, baby, retirement, graduation, and "welcome to the neighborhood" gifts.
- **Take note of people** taking retirement, getting married, having a baby, graduating, and new school teachers (these announcements are usually in the local paper) and send them a personal invitation to join.
- **Career Day at high schools**. Not all high school graduates go to college. Enlist young talent and energy.
- **Start a Couples OHCE group or special interest OHCE group** (money management, special diets, travel, gardening, etc.).
- Subscribe to or volunteer with a **Newcomers' Greeting Service** (mail; phone; visit; pick up; introduce; or answer questions).
- **Ask youth group leaders** (4-H, Scouts, Campfire, etc.) **to prepare a list of names** and addresses of persons who might be interested.
- **Do an OHCE project** with a Kindergarten or First Grade and **become acquainted with parents who are putting their last child in school**.
- **Offer Parenting Skills Workshops** for young parents whose names you get from the paper when their baby is born.
- **Invite 5 persons for coffee and explain the benefits you receive in OHCE**. Invite them again to an OHCE meeting and ask them each to bring a friend. Keep enthusiasm high.
- **Have noon get-togethers with employed prospective members** and try to create an interest in organizing a Lunch and Learn group.
- **Keep brochures handy** in purse, pocket, car, and home.
- **Use TNT** (telephone 'n transportation) for prospective, absentee, and former members.
- **Keep a file of prospective members** with notes on information gathered and dates contacted.
- **Help visitors feel comfortable at all OHCE functions**. Use name tags/introduce visitors/make to feel special/ be mindful of special interests. Give the lesson the top priority at OHCE group meetings.
- **ASK!!** People like to be asked. Research about organizations and members shows that many people never join because they are never asked. Even if you asked and they said "no" several months or years ago, things may have changed for them so ask again--don't leave them out!

#### **SOURCES:**

Connors, Tracy D., ed. (1993). The nonprofit management handbook: Operating policies and procedures. Somerset, NJ: John Wiley & Sons, Inc.

2003: A FaCE Odyssey.

Mary Selk, Extension Educator, Payne County.

Crystal Welch, OHCE member, Payne County.

# Tips for Mailed Nominations/Invitations to Join OHCE

**Remember:** Your mailed item will be the image of OHCE to most of the prospects you contact. It can go either way--good image or bad image. Consider everything carefully beforehand.

## The Outside Envelope

- Get them to open the letter! (Studies show 80% of bulk mail is read.)
  - Choose/design an envelope that is attractive to open.
  - Consider putting something bulky in the mailer.

## The Inside Letter

- Make your cover letter effective. KISS--Keep It Short and Simple--but long enough to tell your story. Target one or two OHCE issues/benefits. Underline, use arrows, etc.
- Can be prepared like a formal invitation, such as a banquet or wedding invitation.
- Consider using one or two testimonials.
- Use short, believable paragraphs.
- Enumerate “tangible” benefits--sell a benefit, avoid a loss.
- Ask for membership (action desired) in the last sentence (marketing research shows that, when reading letters such as this, people generally read a P.S. first, then the first paragraph, then the last paragraph).
- If you use a P.S., it should include another offer or action required.
- These are “magic” words: new, free, limited, special.
- Include urgency in the letter (a time limit).
- Personal signature is important--most effective for response.
- Have at least two other persons not familiar with OHCE check the letter for understanding.
- Never mimeograph or copy the letter so that it looks copied--should be letter quality.
- Use an accordion fold (Z fold).

## Extra Enclosures (Reasons to Join)

- Enclosures should be relevant to the cover letter.
- Experiment with extra enclosure versus not having one--normally, extra enclosure(s) will be successful.
- Use people pictures, if possible. Testimonials are very good.
- Possible enclosures:
  - Description of OHCE’s accomplishments as well as what OHCE has done for the prospective member.
  - Educational OHCE programming announcements.
  - A list of publications people can buy from OHCE.
  - Family and/or community issues--giving need to join.
  - Copy of newsletter.
  - Decal, pin, seal or other product with OHCE logo.
  - List of services, such as: monthly educational lesson and meeting, monthly local newsletter and *FCE Today* magazine from NAFCE, quarterly county meetings and educational programs, annual district and state and national meetings/educational programs, field trips, special interest workshops at the local/state/national level, leadership training, linkages with Oklahoma Cooperative Extension Service/OSU, NAFCE’s action notebooks on family and community issues, etc.

*(see other side for more ideas)*

## Response Device

- Make it easy to respond. Put in a return card (postage paid) or SASE (self-addressed stamped envelope). Have a phone number clearly noted (local or toll-free).
- Give payment options.
- Give dates of trial offer periods, if applicable.
- Keep application simple with enough space to write. Don't ask for information you don't need.
- Use smear proof and blot proof paper--glossy paper tends to smear.
- Involve the reader in the response (ex. yes/no tokens or stickers).

## Bonus Ideas

- When to mail? Cold weather months.
- Day of the week? Mail end of week or midweek so they get in the early part of week (should receive when they get their bills).
- If a fee increase looms in the future, encourage prospects to "join before dues increase."
- Best prospects are those who have been members before.
- Don't drop non-members quietly. Mail three or four times. If no response, **call!**

## Sources

The Support Center, 525 NW 13th, Oklahoma City, OK 73103. (405) 236-8133.  
Support Center of Oklahoma, 1120 S. Utica, Tulsa, OK 74104. (918) 579-1900.  
American Society of Association Executives, 1575 Eye Street NW, Washington, DC. (202) 626-ASAE.  
*Association Management* (magazine), April, 1988.



# Our PLAN OF ACTION to Recruit New Members

**OHCE Group**

\_\_\_\_\_  
Prospective Members (target audience)

\_\_\_\_\_  
Year

<b>Goal:</b>					
Date	Recruitment Activity	Person(s) Responsible	Cost		Evaluation: How will you evaluate effectiveness/success?
			Projected	Actual	