



Recruitment & Retention

RPEA

The purpose of this tool is to provide guidance and assistance to the Area Directors, Assistant Area Directors and Chapter Presidents as they strive to recruit and retain members in RPEA.

The success of any recruitment campaign will depend upon the willingness of the RPEA Board, Area Directors, Assistant Directors and Chapter Presidents to commit time, effort and resources to the recruitment process.

To begin:

Why do members join and stay with an organization?



Membership is a personal issue. One of the major functions of effective recruitment is to break down the attitude of indifference. Membership recruitment is best accomplished by one personal contact at a time.

A Sense of service. Most public service retirees have a desire to help others. When a chapter provides its members the opportunity to be productive and helpful to others, they will join and stay with it.

Fellowship. The chapters must provide its membership the opportunity to meet in a climate of friendliness and commonality.

Pride. This is perhaps one of the strongest bonds between people and their organization. Strive to make the goals and actions of your society ones which will make your members proud.

Belief in the organization's objectives. No one joins any organization (or remains a member) unless he/she believes in its goals and objectives. You must make your objectives widely known and solicit membership help in their achievement.

Information. RPEA must provide a source of information at the local and state-wide level. Acquisition of knowledge is an essential step. The information disseminated by the Board to the Area Directors, Assistant Area Directors and Chapter Presidents must be consistent, relevant and pertinent to the goals and objectives of RPEA.

A member needs:

A sense of belonging and that he/she is needed as a contributing member – not just a title, number or monetary contributor. A sense of sharing in planning and organizing. If her/his ideas are not heard, this need will not be satisfied. To have responsibility and challenge within the range of their abilities and time that contributes to the goals. To keep informed in order to feel status as an individual. To have confidence in the leadership – confidence based upon honesty, consistency, fairness ad strength.

Know your audience:

As you approach a prospective member it is essential that you do so with an open mind. Do not assume that anyone wants to join only if they are invited. **MEMBERSHIP IS SALES!** Prospective members will be skeptical and will object because it costs too much, they do not have time or they cannot see any benefit in joining. Be prepared to debunk their excuses by thoroughly knowing what RPEA stands for.

Benefits of Membership:

What RPEA can do for you. Advocacy and Legislation

- **A strong voice at the PERS Board of Administration**
When the CalPERS Board meets, RPEA is there protecting our investments, improving access to benefits, fighting for simple procedures and advocating for a fair deal for state, local agency and classified school retirees and their families.
- **An effective team of professional and member lobbyists**
RPEA works to protect retirement security, protects retirement funds from raids, fights to improve retiree health and wins additional post-retirement benefits such as vision care.
- **A successful partner in advocating for retirement security**
RPEA works with unions and community groups throughout the state to protect benefits. RPEA has stopped efforts to privatize CalPERS and protects the defined benefit pension system.
- **A powerful force to elect qualified representative at CalPERS**

RPEA is committed to electing our CalPERS representative, and its members helped elect several CalPERS board members. Our representatives protect our retirement. RPEA will continue to help elect strong representatives to make sure that CalPERS members have a board that listens to their needs.



RPEA Membership Benefits:

Low-cost Group Insurance Plans, Travel/Accident Insurance, Emergency Assistance, Legal Plan, Prescription Drug Discount Plan, Pet Insurance, Cancer Care Reimbursement, Long Term Care Plans, Medicare Supplemental Insurance Plan, Dental Plans, Visions Plan Hearing Aid Service, Home Security Alert System,

Discounted Entertainment Attractions

Aquarium of the Pacific, California Academy of Science, Gilroy Gardens, Great America Theme Park, Legoland, Madame Tussaud's Wax Museum, Alpine/Palm Springs Aerial Tramway, Roaring Camp Railroad, San Diego Zoo's Safari Park, Six Flags Discovery Kingdom, Universal Studios.

Discount Products and Services

Atriba Discount Products and Services – a large array of discount products, travel, car rentals, cell phones, electronics, dish TV, new & used car savings, etc.



Recruitment Techniques

There are techniques that can be utilized to recruit new members into RPEA. The variety of techniques is limited only by one's imagination. However, three of the most important methods of recruitment are **face-to-face contact, telephone, and direct mail campaigns.**

Face-to-Face Recruitment

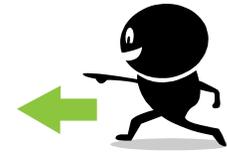
The face-to-face technique requires one to possess the qualities of authenticity, rapport and persuasive dialogue. There must be a genuine interest in the potential member as an individual and a sincere belief that joining the RPEA is in their best interest. Communication during a contact should remain useful in a positive, knowledgeable manner and be harmonious. Finally, you should be prepared to counter any voiced opposition.

The success of this technique relies strongly on timing. The discussion should be conducted at a time when the potential member is relaxed, open to dialogue, open to new ideas and accessible. This type of planning may take the form of a social event or a meeting designed for the purpose of recruiting new members.

Face-to-Face recruiters should know and be able to converse about the following:

- RPEA's efforts to affect important legislation

- The size and representation in and by RPEA
- The names of prominent people that belong to RPEA
- The group insurance package available to RPEA members
- The meetings held by RPEA, where they are held (Chapter meetings), what they are about
- The goals of RPEA
- The needs of RPEA and how a prospective member (still working) will prove valuable to RPEA
- How to Join RPEA
- The cost of joining and the cost of not joining



A Mail Campaign

A well-planned and systematic direct mail campaign to recruit individuals into RPEA is probably the most effective and efficient means available. You will be able to reach many more prospective members during a relatively short period of time and without a great deal of expense versus the one-on-one approach.

The Mailing List

Who do we send our mailing to and where do we get their names and addresses? This has been one of the most perplexing problems facing RPEA. Because this is such an important element of membership recruitment, a separate section has been generated (*refer to, "Quick and Easy Guide for Recruitment"*).



The Direct Mail Plan

It is essential that several key decisions be made. These include:

- What are their interests?
- What part of our organization will appeal to them?
- How many mailings will we send?
- How does this campaign fit into our overall recruitment plan in terms of time and financing?
- Who is our target audience?
- When should we mail?
- What are our goals for this drive?

Generally, one cannot depend on a single mailing to net very many new members. Therefore, plan on a minimum of two mailings (preferably four) with each target group.

When to attempt a mailing

Avoid times when RPEA will be in competition with holidays such as Christmas when pocketbooks are thin. Ideal times will be those that coincide an upcoming meeting. A membership drive can be successful if it occurs at a time when “things are happening” within RPEA.

The Recruitment Letter

When making initial contact with a potential member, include as much information about RPEA as briefly and concisely as possible. Keeping the letter as personal as possible is important. You want him/her to join, but why? For example, you want him/her to join because he/she will increase our collective voice in the state legislature. You want him to join because he/she is missing out on... You don't have to dwell on the theme for long, just use it to grab attention. How RPEA will benefit the person directly should come up next in the letter.

By underlining the category of the benefit, you make it easy for the reader to see exactly what types of things RPEA has to offer.

Once, the reasons for joining RPEA are clear, an invitation to do just that is in order. For example, if your lead paragraph dealt with the importance of presenting a large voice to our representatives, follow that by saying something like, *“RPEA works to protect California public employees, and you can receive all the benefits by joining RPEA today.”* Then spell out how he/she can do that, giving instructions on how to fill out the enclosed membership application and give them information about dues, etc. End with another reminder to do it today

Other Recruitment Strategies

The following is a list of other recruitment strategies that can be used:

- Include the cost of RPEA membership



- **Retiree Member (CalPERS annuitant)**
 - **Beneficiary Member (I am a beneficiary of a CalPERS retiree)**
 - **Affiliate Member (I am still working for a CalPERS employer)**
 - **Associate Member (I support the goals of RPEA members)**
-
- **Establish rewards for individuals/chapters that recruit the most new members**
 - **Work through human resources departments to promote membership in RPEA**
 - **Plan an Affiliate member meeting that specifically targets recruitment of new members**
 - **Conduct a phone-a-thon to directly contact lapsed members**
 - **Provide membership incentives to members who renew their membership or recruit a new member**
 - **Offer a gift certificate for early renewal**
 - **Have the President contact new members to welcome them**
 - **Use the RPEA newsletter as a recruitment tool**

Member Retention

Now that you have recruited all those new members, how do you keep them on-board?

Getting off on the right foot with a new member is probably the most important thing RPEA can do in terms of member retention. Whenever someone joins RPEA, the first step in welcoming him/her to the group should be a personal call of congratulations from someone in RPEA, (Headquarters/local Chapter President) who should include an offer to answer any questions the person may have. Let him/her know that that RPEA is aware that they have joined, is glad to have him/her and will be sending them a new member package that contains information about benefits, their new chapter and its meeting dates.

It is a good idea for local Chapter Presidents to assign a current member to accompany the new member to the first Chapter meeting. People who are naturally shy will appreciate this tactic, and even those who aren't shy can benefit from having someone there they know to answer any questions they may have. At the meeting, see that the new member is officially introduced, and give them an opportunity to get actively involved right away. Some new members will be natural leaders, some will be followers, and some will simply want to take advantage of member benefits without actually getting too personally involved.

Make sure that the new member starts receiving all of the benefits RPEA has touted so loudly. If there is a delay, make sure the member knows about it. No one likes to pay for something and then have to wait to get it. New members are no different.

Current Members

A lot of hints contained in the previous section on new members can apply to current members. Understanding the member's desire for involvement and keeping informed about new benefits on a regular basis are; of course, of utmost importance. RPEA should develop and send out a questionnaire to better stay in tune with the membership's changing needs and problems, asking him/her to rate RPEA services and point out any deficiencies. Then follow up on any negative comments by telephoning or writing the member and letting him/her know why the problem occurred and how it has been remedied.

Renewals

Despite all of your hard work to make new members feel welcome and keep current ones happy, some members will still resign from RPEA. What can you do about them? The first step in dealing with a non-renewal is to contact him/her by telephone and let him/her know that their membership has lapsed (sample letters are available). Often a person has simply forgotten to pay their dues or had been trying to decide whether or not renew and hasn't been able to make up their mind. A letter of reminder that recaps RPEA's most important benefits will often help to take a step in the right direction.



Things that can help RPEA retain members

- Carefully planned meetings that start and end as announced
- Programs that are of general and special interest to members
- Programs that include a helpful and timely information exchange and an opportunity to network afterwards
- A newsletter that reports on activities and is digested in short nuggets
- Opportunities to solicit volunteers
- Recognition of achievement
- Leadership that is open to advice and suggestions and solicits ideas for improvement
- Rotation of at least one-third membership in all committees
- Encouragement of new members to feel welcome
- New, improved, fresh activities, services and programs
- Orientation for volunteers
- Recommend new (old) members attend (serve) on Chapter Board meetings

Brochures and Materials

In addition to direct mail letters, promotional materials are useful in conducting a recruitment campaign (Special Edition Newsletter/Member Benefit Brochure). You could utilize a postcard to follow up on membership recruitment letters. Include a current edition of the Newsletter. Whatever the effort, remember that promotional materials are always most useful when they are clearly and concisely presented and when they make the reader feel as if they are talking to him/her personally.

Frequently Asked Questions (FAQ's)

It is important to be prepared with ready answers to common objections. Acquaint yourself with these responses, and be ready to overcome reluctance to commit to RPEA.

I can't afford the dues. How can you not afford the dues? The future of California's public employees is at stake and needs your support. Consider RPEA membership as an investment in yourself.

Can I pay my dues in installments? As a retiree you can have your dues deducted from your CalPERS check or you can renew your dues every year and pay by either check, MasterCard or Visa.

Why is RPEA so important? RPEA works to protect California public employees by giving them a strong voice at the PERS Board of Administration, and in the State Legislature. We have an effective team of professionals and member lobbyists. RPEA advocates for retirement security. RPEA is a powerful force to elect qualified representatives at PERS.

All I want are the Newsletters. Even if all you want are the newsletters, it still makes sense to join RPEA. By joining RPEA you receive a host of other benefits.

I used to be a member, but I had a problem. If you had a problem, let's resolve it.

Why does RPEA have a toll free number? RPEA constantly monitors costs to ensure that your money is spent wisely. Having a toll free number also enhances our ability to stay in touch with our out-of-state and out-of-country members.)

Won't I get a lot of surveys to complete if I join? RPEA does survey its membership, but only on a random basis. Surveys are important because we need information when we lobby for our membership.

If I join, I want to contribute. How can I do this? Be active, attend your local chapter meeting and volunteer for committees. Your input is needed and your opinions should be heard. An even greater contribution is to encourage others to join RPEA.

I can't go to all the meetings. It is not necessary to attend meetings to take an active part in RPEA.

Do you have guest speakers at meetings? Yes, and we ask our members what they want.