



RECRUITMENT MANUAL

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Introduction

The value of Sertoma is personified through our ability to respond to the needs of today while planning for the future. As the needs of our communities shift and changes, so do our programs—ensuring that we are truly an organization of civic minded individuals that can and do "Make Life Worthwhile Through Service to Mankind."

Our Sertoma clubs are as diverse as our membership. The club's goal should be to carry out the mission of Sertoma, while making membership valuable and convenient for potential Sertomans. Recruiting new members who will sustain our clubs as well as lead them into the future is often a huge challenge for today's Sertoma clubs. This manual is designed to assist clubs through the recruitment process, sharing tips and resources that can be used to develop a plan that meets the needs of your club.

Step #1: Perform a Club Assessment

Before marketing the club to potential new members, it is important to gauge the club's attractiveness to prospective members. Think about your own club for a few minutes and see if you recognize any of the following:

- Is your club experiencing a decrease in member involvement?
- Have club meetings become routine?
- Is your club locked in tradition and unwilling to change?
- Are you finding it harder to attract and keep new members?
- Is there a genuine desire to bring in new members?
- Do club procedures make it difficult to bring in new members?
- Are the same few members doing all the work?

If your club is experiencing any of the above, it's time to step back and identify areas that could use a new approach. An assessment can provide invaluable insights into a club's health by identifying strengths and weaknesses, and opportunities for improvement.

A Club Assessment Survey can be found in the Resources section of this manual. Clubs are encouraged to modify, add and delete questions based on specific areas of concern. It is important that clubs not shy away from addressing club traditions, such as outdated programs that no longer meet the needs of the members or the community. Include all members in the survey, mailing or emailing the survey if necessary. Encourage members to suggest new ideas or strategies, and ensure them that all information is confidential.

The results of the Club Assessment Survey can help clubs determine what has kept them from reaching their goals and what must be done to overcome these obstacles. For example, if an assessment reveals that a majority of club members feel the club's projects do not promote the Sertoma mission, the club should consider revamping current programs or trying new ones.

An annual assessment gives clubs a framework within which members can create a plan for positive change, including membership recruitment. By continually evaluating and adapting projects and practices, a club will maintain the interest of current members and attract new ones.

Step #2: Market Development

After clarifying the club's mission and identifying strengths and weaknesses through the Club Assessment Survey, you are ready to develop the message to be communicated to prospective members. Club members are aware of the rewards and benefits of Sertoma membership and are best suited to create a message that shows prospective members how they can benefit from belonging to Sertoma.

Before you can successfully market your Sertoma club to others, you must believe in the value you provide through your service. If you don't believe in Sertoma and your club, no one else will either. Prospective members want to be part of a dynamic group, so you must be enthusiastic when sharing your club's message.

Prospective members join Sertoma because they feel the organization will provide value to their lives. Research has shown the leading factor in joining Sertoma is the opportunity for individuals to personally make a difference in the lives of others, in their local community and throughout North America. It is important that all clubs share in the Sertoma mission and make this the focus of their recruitment practices.

The club's recruitment message does not have to be a written script. A more effective tool is a list of informal talking points that all members can refer to when speaking about Sertoma. The list below provides a basis for developing talking points for your club. Clubs should customize their list to include activities and rewards specific to them, and members can also complement the list by describing personal experiences. There is a Club Marketing Plan Template included in the Resource section of this manual.

Modify your message for different markets. What is important to one prospective member may not be important to another. It is natural for a prospective member to question what will be expected of their Sertoma membership. Club requirements differ, but all members have some basic responsibilities, such as participating in events and meetings, assisting with recruitment, and paying dues. Be open with prospective members about the time commitment and financial obligation of your club.

When recruiting potential members, share your Sertoma experiences and excitement, but avoid being overzealous. No one likes to feel pressured to join. The best way to generate interest is to let your satisfaction and fulfillment speak for you. When communicating your message, remember not to assume that the public is aware of Sertoma. Even if your club has been a part of your community for many years, it is not a guarantee that people

will know about Sertoma. Even those who are familiar with Sertoma may not know what your club actually does in your in your community.

The following is an overview of Sertoma membership benefits:

- **Fulfillment:** Work on projects that improve the lives of others and foster personal satisfaction and recognition.
- **Fellowship:** Cultivate relationships with other Sertomans who have similar interests and values.
- **Diversity:** Meet fellow Sertomans from different backgrounds as you participate in projects that address the Sertoma mission.
- **Networking:** Associate with other Sertomans representing a variety of professions to facilitate valuable business contacts.
- **Leadership:** Develop skills at the club level that enhance leadership opportunities at all levels of the organization as well as professional capabilities.
- **Mentoring:** Reach out to fellow Sertomans and share your expertise.
- **Convenience:** Belong to an organization with professionally developed programs and resources that enable members to provide valuable volunteer service.
- **Member Services:** Receive quarterly publications of the *Sertoman*, and the *Sertoman Digest*.

Understanding the benefits offered by Sertoma, being prepared to talk about them knowledgeably, and complementing them with personal stories is a comprehensive, effective approach to communicating the value of membership.

Step #3: Identifying Prospective Members

Now that you know what you are marketing, it is easier to determine who you should be marketing it to. Prospecting is the process of identifying people who would be attracted to the Sertoma mission and who would bring ideas, enthusiasm, and needed skills to the organization.

Who is right for Sertoma?

As clubs set out to identify prospective members, one question frequently arises: who should be invited to join Sertoma? The answer is simple: any civic-minded community member that can recognize the value of, and have the desire to be a part of Sertoma's mission. Look for potential members in your place of employment, your neighborhood, your church, anywhere you see people that want to make a difference.

Following are a host of resources and tactics for generating promising prospects:

- **National and Local Affiliates:** These organizations already have knowledge of Sertoma and benefit from their association with your club. Ask your National Affiliate to provide membership for a representative.
- **Mission Activities:** Who are the recipients of your club's sponsorship funds? They have a vested interest in the strength and success of your club. Ask them to commit a representative for membership in your club.

- **Former members:** Review old rosters of past members who might be interested in renewing their membership. A majority of Sertomans terminate membership due to time constraints. This may be a temporary situation. These individuals believe in the mission of Sertoma and may appreciate being asked to rejoin their club. This is one of the most overlooked target areas, and should be reviewed at least annually. There is a sample Letter to Former Members in the Resource section of this manual.
- **Business associates:** One of the best places to recruit new members is at your place of business. Invite colleagues, associates and vendors to a meeting or event, and encourage members to research and target individuals in their profession.
- **Donors:** Add to your list the names of donors and individuals who have otherwise supported your fundraisers or charity drives. If you hold silent auctions or raffles, be sure to collect the names and addresses of participants. Published lists of contributors to other charities that relate to your club's interests are also a good resource.
- **Local nonprofits:** Invite associates and friends involved in other volunteer and professional organizations to attend events to learn more about Sertoma. Establishing partnerships with these groups and working together on projects is an effective way to reach the members of similar-minded organizations:
- **Newspapers and local magazines:** Look for announcements of newly-opened small businesses or community members who have been promoted or appointed to new positions. Send a letter of congratulations, describe Sertoma, and invite them to your next meeting.
- **Local Chamber of Commerce:** Request a directory of locally-owned businesses in your area.
- **Trade shows and community events:** Set up a booth or table, have literature on display, and collect business cards so names can be added to your list. Offer a prize drawing as an incentive for prospects to stop by. Volunteering at these events is also a great way to make contacts and raise the profile of your club in the community.
- **Award winners:** Recipients of an award from your club often want to give back to the organization that helped them. Invite them to join.

Step #4: Making Contact

Now that you have built a list of potential prospects, it is time to make contact. Following are some options for reaching prospective members:

Email: Email is an economical, timely method of communication and is often cited as the preferred means of contact by professionals—particularly younger professionals. However, relying on email because it is cost-effective can alienate prospective members who are seeking to join a club because of the personal interaction it affords. When recruiting, email is best used to complement other types of contact. For example, an email could be sent to a prospective member inviting her to a meeting and then be followed up with a phone call.

Mailings: Direct mail can create awareness among large numbers of prospective members without seeming intrusive. For any mailing to be successful, clubs must carefully maintain their mailing list to ensure materials are reaching the appropriate

targets. Contact information must be updated frequently and prospects who are not interested must be removed. Personalize direct mail pieces and letters when possible. A sample Invitation to Prospective Member is included in the Resource section of this manual.

Advertising: Like mailings, advertising can create awareness among large numbers of prospective members but is impersonal. However, advertising can complement direct mail efforts by reaching prospects that have not been captured on existing mailing lists. When considering purchasing advertising, think beyond traditional venues like newspapers. Online advertising can increase traffic to a club website, and hits can be tracked to determine the effectiveness of the ad.

Phone calls: Calls are effective because they give a personal touch, plus you can answer questions and demonstrate enthusiasm. Calls also elicit immediate feedback, and the caller can address the specific needs or questions of the prospective member. Phone follow-ups to direct mail campaigns can increase the response rate from 3 percent to 10 percent.

Face-to-face: Inviting prospects to a meeting, whether it is a regularly scheduled club meeting or a recruitment event, is one of the most effective ways to educate potential members about the role of Sertoma in the community and the benefits of membership.

Some general tips for holding a successful recruitment event include:

- Begin planning well in advance, at least three months before the event.
- Dedicate a club meeting to brainstorming and ask members to bring lists of potential invitees.
- Consider holding award ceremonies in conjunction with the event. This shows prospective members that the club appreciates and acknowledges participation and effort.
- Keep the event short, informative and interesting. Do not inundate prospective members with too much information.
- Create a brief presentation for the speaker to use as a means to promote club involvement in the community. Utilize the Sertoma Recruitment DVD to share our impact beyond the club level.
- Choose a date and time that appeal to your prospects. Be sure to accommodate individuals who work during the day. Avoid holidays.
- Appoint a member as the contact for the event so all questions and RSVPs can be referred to one person.
- Send invitations at least a month before the meeting. Make sure your invitations include the Who, What, When, Where, and RSVP.
- Let invitees know they can bring a friend. Prospective members might feel more comfortable attending an event if they can bring a guest.
- Before the event, email members a list of attendees so they are aware of who will be present.
- Have Sertoma materials to distribute: SERTOMA **SAFE**Ears![©] and Annual Fund brochures, issues of the *Sertoman* and *Sertoman Digest*, business cards with club

contact information; and giveaway items that can serve as both a “thank you” and as a reminder of Sertoma.

- Make name tags for everyone, indicating whether an attendee is a member or a guest.
- Have all guests sign in.
- Begin and end on time.
- Ask each attendee to introduce themselves and share a brief description of business or hobbies.
- Consider collecting business cards for a raffle and prize drawing at the end of the evening.
- Ask prospective members to join! Have membership forms available at the meeting.
- Follow up after the meeting with a phone call, email or letter.

General tips for preparing letters:

- Keep communications short and succinct—no more than one page.
- Gear your letters toward your audiences. If a prospective member has been recommended by a member or is familiar with Sertoma, the letter will have a different tone than a letter sent to a prospect that is less familiar with Sertoma.
- Send letters on your Sertoma club letterhead.
- Proofread letters carefully.
- Highlight phrases like “invitation only” and “you have been selected.” This relays the message that the recipient has been chosen rather than solicited from a generic audience.
- Request a direct response within a specific period of time.
- Send letters from the club president or membership chair.

Step #5: Retaining New Members

A member’s first three years are crucial in their journey as a Sertoman for two reasons. First, it is the most important time to build loyalty to the club and the organization. Second, this is the time during which members are most likely to terminate membership. Clubs need to inform new members, keep in contact, and encourage participation to increase a new member’s chances of becoming a dedicated Sertoman.

- **New Member Orientation:** Educate members early so they feel vested in the organization. Talk to new members about your club’s history, programs and events.
- **Get Members Involved Early:** There is a greater chance that your new members will see value in their Sertoma membership if they are included in club projects and events. By encouraging new members to become involved, they will form a vested interest in club happenings, thereby enforcing their commitment to the club and the Sertoma mission.
- **New Member Feedback:** Once new members join the organization, remember not to let communications drop off. Staying in touch with new members through phone calls and email will show them they are valued. Also, invite new members to meet casually with club officers and other leaders within the first 90 days of their membership. Their input

will give new perspectives on the club. Finally, utilize the Sertoma Membership Retention Manual included on the Sertoma Manual CD.

Conclusion

Membership growth must be a vital concern to every Sertoman. Therefore, every member has the privilege and obligation of seeking new members. Some ways to involve current members in recruitment efforts include:

- Recruitment teams. Divide your membership into teams and make recruitment a contest.
- Issue a challenge. Conduct a membership challenge and ask every member to recruit at least one new member this year. Make sure all members have materials to distribute.
- Recognize members. Consider awarding a prize to the member with the most new recruits at the end of the club year.

Developing and executing a recruitment strategy can seem overwhelming. Start small, take your time and learn not to take it personally when you ask people to join and they say no. Also, don't let budget concerns discourage you. Outreach to a new audience does not necessarily equal extra expenses. An email campaign to targeted prospects followed by a phone call is a cost-effective and simple approach. And remember, your Sertoma Headquarters staff is always ready to answer questions, offer tips, and direct you to resources to help you develop and launch your recruitment plan.

Membership recruitment is a year-round activity that affects all aspects of club life, including sponsorship programs, public awareness and fundraising. Set realistic goals, create a calendar of tactics that will achieve these goals, and work together to ensure success.

Resources

The following pages contain samples of various tools to assist your club with new member recruitment.

Additional tools and materials can be found in your Sertoma Manuals CD, on the Sertoma Web site, or by calling your Sertoma Headquarters staff.



Club Assessment Survey

This survey is intended for use by the club. All members should complete this survey to help assess member satisfaction with club sponsorships and events. Please return your completed survey to the club secretary. All responses are confidential.

Do you feel welcome in your Sertoma club? Yes No
If no, why not?

Do you feel comfortable sharing concerns with club leaders? Yes No
If no, why not?

How would you rate your club's involvement in the following activities?

	Excessive	Adequate	Insufficient	Unknown
Membership recruitment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Membership orientation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Membership education	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Local sponsorship projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Division sponsorship projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Club fundraising	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sertoma fellowship	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Have you participated in club sponsorship activities? Yes No

How did you become involved? I volunteered I was asked

Please indicate your involvement in the following activities:

	Currently Involved	Would Like to be Involved
Local sponsorship projects	<input type="checkbox"/>	<input type="checkbox"/>
Division sponsorship projects	<input type="checkbox"/>	<input type="checkbox"/>
Club public relations	<input type="checkbox"/>	<input type="checkbox"/>
Club fundraising	<input type="checkbox"/>	<input type="checkbox"/>
Sertoma Sponsorships	<input type="checkbox"/>	<input type="checkbox"/>
Sertoma fellowship	<input type="checkbox"/>	<input type="checkbox"/>

Are you satisfied with the club sponsorships and activities?

Do you feel that the club sponsorships and activities are meeting the needs of the community?

Do you feel that the club sponsorships and activities are meeting the mission of Sertoma?

Do you enjoy attending regular club meetings? Yes No
Why?

What changes would improve the club meeting?

How would you rate the amount of the club's fellowship activities?

Too many Right amount Too few

How would you rate the amount of Sertoma information shared with club members?

Excessive

Adequate

Insufficient

How would you describe the club bulletin/newsletter?

Comments:

**Thank you for taking the time to complete this Club Assessment Survey and
for your commitment to improve our club.**



Club Marketing Plan Template

Objective

In one or two sentences, clearly state what you hope to gain from implementing your marketing plan.

Example:

The goal is to grow and diversify membership by identifying prospective members, and increase membership satisfaction by involving a larger percentage of members in club project.

Goals

List the club's membership goals for the upcoming club year.

Example:

- Net gain of 5 members
- Improve retention rate

Target Audiences

Identify types of members you are trying to attract and prospect sources.

Example:

Target audience to include individuals who have a demonstrated interest in doing volunteer work.

Prospect sources:

- Former members
- Donors & event sponsors
- Business associates
- Personal contacts
- Organizations benefitting from club sponsorship
- Affiliates
- Service to Mankind recipients
- Trade shows and community events

Marketing Your Club

Create a list of talking points about the benefits of membership that all members can refer to when speaking about your club and Sertoma. Use the following questions to help develop your talking points:

- Why did current members join the club?
- What do current members say is the best part about being a Sertoman?

- How has your club specifically affected the community?
- What makes your club unique?
- Why would someone join your club instead of another volunteer organization?

Use the agreed upon talking points as the basis for all marketing communications so a consistent message is presented in all venues.

Strategies

Describe the strategies you plan to use, focusing on those that have been successful in the past.

Example:

- Direct mail.
- Advertise in local print media.
- Engage local radio and television stations if possible.
- Participate in local trade shows, health fairs and other community events

Budget

Estimate the cost of each tactic, including design, printing, postage, advertising, meeting expenses and booth space.

Timeline

In a separate document, map out the timeline for implementation.

Monitoring and Reporting

Determine who will track goals and how often the plan will be revisited and adjusted.

Example:

The membership committee chair will review membership numbers on a monthly basis and compare them to established goals. The chair will report progress to the board of directors, along with any suggestions for modifications to the marketing plan.

General tips:

- Be flexible and revise your marketing plan as necessary.
- Be patient and allow enough time for strategies to have an impact.
- Keep your target audience in mind and make decisions based on their wants and needs.



Sample Letter to Former Member

July 1

James Jones, President
Citizens Bank
55 Main Street
Anytown, Anystate 10555

Dear James;

We miss you! I know that sometimes in life we have obligations and need to prioritize our time accordingly, but I wanted to let you know personally that we miss you as a member of our Sertoma Club.

Let me catch you up on some of the wonderful projects on which our club has been working. This past year we had several successful fundraisers that did not take a lot of effort, including a Golf Tournament in July that raised more than \$5,000! Because we raised more money than anticipated, we were able to present our National Affiliate with funds to purchase additional hearing testing equipment.

In addition to fundraising efforts, we also applied for and received a grant of \$500 that was used to refurbish hearing aids for senior citizens. Other mission activities included distributing hearing health information to our local elementary students.

If you are still looking for a way to help improve the lives of individuals in our community and share in Sertoma fellowship and fun, then coming back to our Sertoma club may be right for you. We miss seeing you!

Please join us at our luncheon meeting as my guest on July 20, as we celebrate our success. Please RSVP to me at by July 15, at 555-123-4567. I hope you will be able to join us!

Sincerely,

Jack Smith
Sertoma Club President



Sample Letter to Prospective Member

July 1

James Jones, President
Citizens Bank
55 Main Street
Anytown, Anystate 10555

Dear James;

I am writing to invite you to learn more about the Downtown Sertoma Club, which is part of a national organization of community minded individuals like you. Sertomans volunteer their talents and energy to help make life worthwhile through SERvice TO Mankind.

The Sertoma mission is exemplified by our national service project, **SERTOMA SAFEears!**© Through this program, Sertomans help spread the word that Noise Induced Hearing Loss (NIHL) is preventable. Sertomans also work on other projects that help meet the needs of our community

Like you, I understand the challenges of juggling the many demands on my time. Yet, it was an easy decision for me to join Sertoma because of both the personal and professional opportunities offered through membership. Not only am I able to participate in programs that change lives, but I have developed lifelong friendships and an invaluable network of business contacts along the way.

Because you exemplify the type of individual who values the opportunity to lend a hand to others, I would like to invite you to our luncheon on July 20 to learn more about Sertoma and the specific projects and events in which our club is involved.

I hope you will consider this opportunity to learn more about Sertoma. I will call you on Tuesday to touch base about the luncheon. In the meantime, please visit our club website at www.sertoma.org. If you would like to reach me before then, please call 555-123-4567 or email me at jacksmith@hotmail.com. I look forward to speaking with you soon!

Sincerely,

Jack Smith
Sertoma Club President



Sample Follow-Up Letter to Attendees

July 21

James Jones, President
Citizens Bank
55 Main Street
Anytown, Anystate 10555

Dear James;

Thank you for attending the Sertoma luncheon to learn how you can help our community by joining Sertoma.

We hope you are excited about the prospect of becoming a Sertoma member. As a Sertoman, you will have the opportunity to work on local projects that address unique challenges facing our community today and to participate in programs developed and sponsored by Sertoman across North America. Each year, our organization provides more than \$20 million through Sertoma scholarships, national service projects and local community needs.

We hope your interest in our mission will continue. You can be sure that Sertoma membership will enable you to give back to your community, as well as provide opportunities to grow personally.

We will be in touch soon with information about our next meeting. In the meantime, please contact me at 555-123-4567 or jacksmith@hotmail.com with any questions.

I look forward to seeing you again!

Sincerely,

Jack Smith
Sertoma Club President



Sample Follow-Up Letter to Individuals Unable to Attend

July 21

James Jones, President
Citizens Bank
55 Main Street
Anytown, Anystate 10555

Dear James:

I am sorry you were unable to attend yesterday's luncheon. We had a wonderful event with a great group of Sertomans and future Sertomans. We would be delighted if you would join us for our upcoming lunch meeting. At that time we will discuss leadership opportunities in the club and upcoming projects and events.

I have enclosed information distributed at the luncheon. I think you will find that joining a Sertoma club can be an exciting opportunity to make a difference in your community, while making new friends that share a common goal. Through Sertoma membership we are able to accomplish more than we could do alone.

Carol Johnson, our Membership chair, will be coordinating the upcoming meeting. She will contact you soon to let you know about the time, date and location. In the meantime, if you have any questions, please contact me at 555-123-4567 or jacksmith@hotmail.com.

Sincerely,

Jack Smith
Sertoma Club President

Enclosures: Sertoma & You brochure
 Sertoma Fact Sheet
 Our Sertoma Club brochure