Recruitment & Retention Reference Manual

COMPONENT RESOURCES

www.padental.org/componentresources
Thank You for your commitment to organized dentistry, your time and enthusiasm. We understand that you might not have time to conduct all of the tasks included in this manual. With this in mind, we encourage volunteers to focus efforts on tasks that they find personally rewarding.

If your time is limited, please focus efforts on:

- maintaining a working relationship with the PDA membership department staff
- personally welcoming new members
- encouraging participation from new and existing members
Contact PDA's **MEMBERSHIP DEPARTMENT** for assistance implementing any R&R activities.

membership@padental.org

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**PROGRAM ASSISTANCE**
- email promotion
- online registration
- CE course materials

**SAMPLE EMAILS**
- welcome to membership
- nonmember outreach
- non-renew

**ROSTERS**
- members
- nonmembers
- non-renews

...and more!
PART 1

DISTRICT/LOCAL VOLUNTEER REFERENCE MANUAL
GENERAL RECOMMENDATIONS

1. **Know your membership benefits.** Volunteers should be well-versed in the language of membership benefits to help communicate membership services, programs and resources to nonmembers.
   - **PDA benefits:** www.padental.org/benefits
   - **ADA benefits:** www.ada.org/member-center/member-benefits

2. **Set achievable annual membership goals.** Goals can be to increase the number of new members (recruitment), work to reinstate former members or limit the number of non-renews (retention). Contact PDA staff for assistance developing these goals.

3. **Maintain open communication** with your district representatives on PDA’s Membership Committee and New Dentist Committee. Contact Andrea at ach@padental.org if you need the representatives’ contact information.

4. **Include PDA membership ads in newsletters or on social media.** New ads will be available in 2018! Ads feature member testimonials and focus on overall membership, advocacy, continuing education and practice management.
GENERAL RECOMMENDATIONS

5. Recognize milestone membership years in newsletters, on your website, etc. Contact PDA for a list of members celebrating milestones.

6. Encourage attendance at district, local and PDA events.

7. Recommend leader attendance at ADA and PDA membership conferences.

8. Stay up-to-date and get R&R tips through PDA’s Society Resources emails. These are sent on a bi-monthly basis to district and local society presidents, presidents-elect and secretaries as well as PDA’s Membership Committee, New Dentist Committee and Board of Trustees. Watch your inbox!
GENERAL RECOMMENDATIONS

9. Include a PDA Presentation in one of your society’s meetings. A list of PDA presentations can be found at www.padental.org/componentresources. Contact Andrea Hoover, component and membership coordinator, at ach@padental.org to schedule a presentation.

10. As a district or local society volunteer, take the initiative to greet and welcome new members at events and meetings. For tips, check out the Creating a Cordial Environment document found in the Event Resource Center.

11. Contact PDA’s membership department for assistance.
   - ach@padental.org
   - (800) 223-0016
PART 2

CALENDAR OF RECRUITMENT AND RETENTION SUGGESTED TASKS
# Calendar of R&R Tasks

<table>
<thead>
<tr>
<th>Month</th>
<th>Project</th>
<th>Goal(s)</th>
<th>Begin</th>
<th>First Steps</th>
<th>Suggestions</th>
</tr>
</thead>
<tbody>
<tr>
<td>August</td>
<td>Meeting Notification</td>
<td>Communicate all upcoming meetings to all members and nonmembers (next 5 months at minimum, preferably all meetings through April/May).</td>
<td>June</td>
<td>Schedule meeting dates as far out as you can. Develop a brochure or postcard highlighting the value of membership.</td>
<td>Send a letter or postcard. Include a &quot;Dinner on Us&quot; coupon for nonmembers, good for one dinner meeting. Host one meeting with a &quot;nonmember&quot; focus and highlight membership benefits. PDA staff or leaders can give a presentation.</td>
</tr>
<tr>
<td>Nov/Dec</td>
<td>Years of Membership Recognition</td>
<td>Recognize and thank members who have demonstrated dedication to organized dentistry.</td>
<td>Sept</td>
<td>Contact PDA for a list of members celebrating milestones. Invitations should be sent 8 weeks prior to event.</td>
<td>Can be done at a regular dinner meeting, but send honorees special notification of the presentation. Present honorees with a plaque, pin (something tangible).</td>
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## Calendar of R&R Tasks

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<td>April</td>
<td>Non-Renew Phone-A-Thon</td>
<td>Contacting non-renews to find out why they have not renewed their membership.</td>
<td>April</td>
<td>Request non-renew roster and sample script from PDA in early April.</td>
<td>Begin calling non-renews in mid-April. Provide a weekly update of efforts to PDA for follow-up. In late May, request an updated list from PDA.</td>
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<tr>
<td>May/June</td>
<td>Member Appreciation Event</td>
<td>Provide tangible membership value. Encourage involvement. Opportunity for networking with colleagues.</td>
<td>Dec</td>
<td>Choose venue/caterer. Start advertising 16-20 weeks prior to the event.</td>
<td>Host a fun event for members: Baseball game, picnic, etc. Consider inviting spouses/guests or office staff.</td>
</tr>
<tr>
<td>Ongoing</td>
<td>Welcome New Members</td>
<td>Encourage attendance and active participation at local meetings and events.</td>
<td>N/A</td>
<td>Develop a welcome email/letter in which you can easily add upcoming meeting dates. Use a new member call script. See PDA’s email and call script templates for ideas!</td>
<td>Send a letter with upcoming meeting dates. Provide contact information for local society leaders. Call them – thank them for joining. Ask what you can do to help. Invite them to the next event as your personal guest.</td>
</tr>
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</table>
“GROWTH IS NEVER BY MERE CHANCE; IT IS THE RESULT OF FORCES WORKING TOGETHER”

JAMES CASH PENNEY

Contact Andrea Hoover at ach@padental.org with questions or for assistance.

www.padental.org/ponentresources

(800) 223-0016