

SAR Membership Retention Guide
Membership Committee, NSSAR



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Retention How to Guide

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Foreword

As is with the recruitment program, the retention program involves all levels of the society working together. This guide provides an overview of retention-related activities, primarily at the Chapter level.

Suggestions and recommendations included within this guide can be implemented by the chapters, depending on the size and resources available to the chapter. It should be recognized that, while not every suggestion or recommendation can be implemented, efforts should be undertaken by the chapter membership to maximize the use of these resources – this is where “the rubber meets the road.”

This document expands on the retention-related suggestions originally identified in the 3-Rs Guide developed by the Membership Committee and published in 2023.

Acknowledgements

Many thanks to the Membership Committee team members and individual contributors whose personal experiences and involvement on various committees helped to make this document.

Bill Sharp, Team Leader

Comments and Corrections

This document will always be a work in progress. Its use will generate new ideas with successes and failures. The membership committee encourages members to contact us with the new and not so good ideas assisting us in maintaining an effective working document.

Contact us:

Send an email through National Membership Committee in sar.org - Members Tab – Membership Committee Website – at top “Send an Email” or [Membership Committee Link](#)

Retention How to Guide

Keeping members interested, involved and contributing are keys to Retention. The **Retention Process** of a member begins when the application is submitted to the National Society for approval and must continue through the long life of a member. This On-Boarding process is very important for the first 5 years when the members are being brought up to speed on the SAR Programs. While many activities are listed in the Retention Section of the 3Rs document, this document expands upon those activities that are key to retaining members.

1. Early Involvement of Applicant

1.1. Involve the applicant during the approval process

- 1.1.1. The sponsor or Chapter Genealogist/Registrar must make sure the applicant is informed on the application process ([Application Preparation Guide](#)), the cost, and current approval lead times by walking applicant thru it. Sponsor or Genealogist/Registrar must be knowledgeable in all this.
- 1.1.2. The Sponsor or assigned compatriot/Mentor must initiate contact with the applicant and begin a welcoming of the applicant to the chapter.
- 1.1.3. The Sponsor or assigned compatriot/Mentor should encourage/invite the applicant and family members to attend chapter meetings and events as a guest, receive chapter newsletter and be kept informed of the application status.
- 1.1.4. Introduce the applicant to new member SAR Compatriot Training programs found on the eLearning tab of the SAR.org website. This training can begin before the application is approved.

1.2. Explore participation interests

- 1.2.1. The Sponsor or assigned compatriot/Mentor should investigate converse with the applicant about his background to determine where his talents could be utilized.
- 1.2.2. Encourage the applicant to explore the SAR programs ([Youth](#), [Veterans](#), [Grave Marking](#), [Color Guard](#), etc.) and identify those where they have an interest. Example: Everybody can be a flag committee member by identifying community entities that appropriately fly US Flag. The SAR can be a vehicle to utilized talents or interests, but it is also a safe environment to explore new activities and programs. The applicant can begin participating in SAR activities and programs before his application is approved.

2. Application Approval and Induction

2.1. Notify the new member as soon as possible of application approval and next steps in induction.

- 2.1.1. Registrar should check application status report every week on Friday, then notify Chapter/State President the applicant has been approved
- 2.1.2. Chapter President and/or State President call new member upon receiving the approval
- 2.1.3. Do not delay “making contact” (send notice and receive response) (see contact Issues Below) with a new member even though the next meeting might be weeks/months away.
- 2.1.4. Make it clear to the applicant that he is a full member of the SAR at the time of his application approval. The induction is ceremonial.
- 2.1.5. Describe what [induction](#) entails

- 2.1.5.1. Include in the Induction meeting the concepts of the [SAR Mission Statement](#).
- 2.1.6. Confirm an induction date when applicant is available.
- 2.1.7. New member can invite family/friends to Induction
- 2.1.8. Publish new member info in the chapter newsletter, Facebook page, or even chapter website. Approval must be granted for info & photos.

3. **Mentoring, Member Training and Involvement**

- 3.1. Implement a Mentor Program [\[Mentoring Programs & Checklist\]](#) so that every new member and recent new member has a support person that can answer questions and help guide them in becoming trained and involved.
- 3.2. An alternative: every new member should be assigned a “buddy,” a member who has been in the SAR for a while. Buddies keep track of each other and foster brotherhood and friendship.
- 3.3. *Member Training* - [Training videos](#) are available to train all members and chapter officers and should be used in an “all the time” effort.
 - 3.3.1. All members including the applicants should be introduced to the [New Member Orientation Manual](#), [Member Training Video](#), and [SAR Orientation Workbook](#) which are available on the National Website.
 - 3.3.2. At meetings, pick a protocol or program and spend 3-5 minutes on teaching it to members or use speaker time to have program committee chairmen talk about their programs.
- 3.4. *Member Involvement* –
 - 3.4.1. Every member should complete the [Member Involvement](#) training.
 - 3.4.2. Every member including the applicant should fill out the [Member Questionnaire](#) and return to designated chapter officers. This offers, at a glance, where the new and regular members have an interest in participation.
 - 3.4.3. The induction ceremony should contain expectations that could be mildly presented such as: “We welcome you to find a youth contest in which you might be interested or join the color guard, etc.”
- 3.5. *Family Involvement* - Involvement in SAR can become a couples or family activity.
 - 3.5.1. Wives, Significant Others and children may be involved in activities
 - 3.5.2. Often the ladies become interested in joining DAR and children should be encouraged to join C.A.R. where they can become involved with their own age levels.
 - 3.5.3. There are National and state level ladies auxiliaries so have spouses/significant others establish a local Ladies Auxiliary.

4. **Hold Great Chapter Meetings**

- 4.1. *Welcoming Environment*-
 - 4.1.1. Make sure all members are invited and encouraged to participate in every meeting and event.
 - 4.1.2. Make sure all members receive personal contact (not just an email notice) about the meeting date, time, location.
 - 4.1.2.1. Setting up a phone/texting tree for personal contact
 - 4.1.2.2. Use social media; web pages, Facebook, etc. (See [Social Media](#) Document on SAR University)
 - 4.1.2.3. Phone call: Text about a phone call coming, “is it ok to call;” then call if ok
 - 4.1.3. Open meeting room early so members can meet and greet each other.

- 4.1.4. Give everybody a Name Tag (buy personal ones from SAR Merchandise)
- 4.1.5. Assign host duties to two or three members who greet and introduce new attendees to other members and wives.
- 4.1.6. At beginning of meeting go around the room and have attendees introduce themselves.
- 4.1.7. Watch for and make every effort to prevent cliques from forming.
- 4.2. *Chapter Meeting Environment* –
 - 4.2.1. Survey members for inputs on the venues and environments using the [Member Questionnaire](#).
 - 4.2.2. Periodically reassess chapter needs based on the surveys and make changes as necessary.
- 4.3. *Non-local Member Location*
 - 4.3.1. Members cannot always be placed close to where chapters normally meet or the applicant asks to be placed in their patriot ancestor's home state/county or burial location.
 - 4.3.2. Chapters need to explore alternatives like virtual participation [[Zoom](#) or [MS Teams](#)] or holding a meeting closer to where member lives.
 - 4.3.3. Zoom availability: special invite or by request for home bound and/or members too distant and can't get to meeting.
 - 4.3.4. Be sensitive to meeting times. Members are both retired or still have a work schedule perhaps with shift issues.
 - 4.3.5. Explore these issues one on one with members especially those who are not attending.
 - 4.3.6. Encourage members residing in other states to transfer or become a dual member to a chapter nearer to where they live. The chapter should also work with a chapter local to the member to make a smooth transition.
- 4.4. *Meeting Locations and Room Arrangements* –
 - 4.4.1. Sites to contact for meetings: Local VFW, American Legion or Eagles halls, public libraries, churches and Masonic Temples may offer rooms to not-for-profit organizations to meet at no charge.
 - 4.4.2. Schedule out several meeting dates into the future (same time & place is best)
 - 4.4.3. Meeting rooms can be arranged with simple round table/seating in a circle (best for interaction), theater style (seats in rows), or classroom style (seats behind rows of tables).
 - 4.4.4. Invite chapter members to describe what they prefer for sites and/or room setup [[Member Questionnaire](#)]
- 4.5. *Food and Drink at Meeting*
 - 4.5.1. Meet around mealtime at a restaurant for a full meal or at a less formal location and have a bag or box meal.
 - 4.5.2. Dessert cookies and soft drinks might be used as refreshments at an evening meeting.
 - 4.5.3. Sweet breads, donuts and coffee for a late morning meeting
 - 4.5.4. Have starting time for the business/program portion of meeting be different than the meal start so those not wishing to participate in a meal may opt out.
 - 4.5.5. Hold the meeting at one venue and then go to a restaurant for a meal and fellowship.
- 4.6. *Meeting Agenda and Protocol*-Meeting agenda should follow the meeting agenda described in the National Handbook Volume IV Protocol-Opening and Closing a Meeting [[Agenda](#)]:
 - 4.6.1. The business meeting may be separated out and held before or following the meal and/or programs so those not wishing to be a part of the business meeting or guests may leave.

- 4.6.2. Hold Business meetings more or less frequently and on a different schedule.
- 4.7. *Exciting and Educational Programs and Speakers- (Refer to the Reinstatement Guide, also located on the SAR Membership Committee web page)*
 - 4.7.1. Have a member talk about his patriot (3-5 min); (don't put compatriots on spot!)
 - 4.7.2. Have exciting speakers who can enlighten and entertain the members.
 - 4.7.2.1. Form a program committee or have an executive officer invite speakers
 - 4.7.2.2. Challenge members to submit ideas or recommend speakers
 - 4.7.3. Speaker sources: Veterans Commission, Political on citizens rights, History Professors, Google Speaker Bureaus, Genealogical Associations, Historical Associations, Museums, Speakers via Zoom, speakers that the DAR has had, Veterans, etc.
 - 4.7.4. Members who can display hobbies or collections or who can talk on local community organizations can provide a welcome diversion and promote organization working relationships.
 - 4.7.5. Share speakers and resources with other chapters
 - 4.7.6. Use Videos, YouTube, etc... from National Society and other sources
 - 4.7.7. Support as many of the National Programs as possible with action and speaker explanation. (see [3Rs document](#) for program links)
- 4.8. Meetings General
 - 4.8.1. Have social events without business (Annual Picnic, visit historical site/museums, etc...)
 - 4.8.1.1. Compatriot Breakfast
 - 4.8.1.2. Patriot Pub Night..
 - 4.8.1.3. Attend local sporting events as a group
 - 4.8.1.4. Attend local "tour" as a group: History Museum, harbor cruise, traveling exhibit, etc.
 - 4.8.2. Incentivize new/regular members to attend meetings by awarding something (certificate of appreciation, challenge coin, SAR Badge (~\$110), etc.)
- 4.9. Chapter Activities
 - 4.9.1. Choose [activities](#) for the size of your chapter that would incentivize the members to participate, based on their interests.
- 5. **Handling Schedule Conflicts/Family Requirements for Non-retired Members.**
 - 5.1. Understand existence of family requirements and attempt to find work around solutions
 - 5.1.1. Hold 1 or 2 events designed for families
 - 5.1.2. Meet at different times and places occasionally (Be sure to inform membership)
 - 5.1.3. Younger members desire social events and are willing to pay; Maybe quarterly or semi-annually, with programs and activities
 - 5.1.4. Keep in contact with those who don't attend meetings but are happy to pay dues
 - 5.1.4.1. Establish a reliable system to track Members who do not attend meetings or events.
 - 5.1.4.2. Then activate a procedure to contact those absent members promptly. Don't wait until dues collection time.
 - 5.1.5. Use [Zoom](#) or MicroSoft Teams Application (License is free to 501(c)(3) organizations[[nonprofit at Microsoft .com](#)]);
 - 5.2. Chapters need to explore what involvement would work best for these members [[Member Questionnaire](#)).

- 5.3. Some members do not have time to schedule and get to meetings but would be willing to work on an at home SAR program like:
 - 5.3.1. Filling in the Americanism Score sheet,
 - 5.3.2. Volunteer to enter data into the Patriot Research System (PRS)
 - 5.3.3. Project of their choosing that fits with the [SAR objectives/mission](#)
 - 5.3.4. Volunteer at VA hospital
 - 5.3.5. Present community awards, ROTC medals, Flag Certificate, speak at service organization, etc.
 - 5.3.6. Work on other members applications and/or your own supplementals
 - 5.3.7. Edit a Chapter Newsletter
 - 5.3.8. Making calls to support chapter (youth, grave marking, parades, etc...) programs.
 - 5.3.9. Update chapter social media pages; Facebook, chapter website, etc...
- 5.4. *At a minimum*, keep membership up-to-date on meetings, events and programs with hopes something might come of interest to them so when family responsibilities lighten up, they will become interested in participation.

6. Loss of Member Contact

- 6.1. Construct and keep membership data base up to date
- 6.2. Establish a Contact or Welfare Committee
 - 6.2.1. Chapter President should call every member one time during his tenure just to say hello. The calls typically lasted only 5 minutes.
 - 6.2.2. Contact committee should call every member who was not at a meeting at least once a quarter or after every missed meeting/event just to touch base.
 - 6.2.3. Welfare committee should contact anyone who might be ill or had not been to a meeting for six months.
- 6.3. Methods to re-establish contact:
 - 6.3.1. Use a mentor or “buddy system” so active members are interconnected with those not so active and can assist in keeping contact. Develop friendships
 - 6.3.2. Initiate a program of more frequent informal contact: phone call, email (if no response, then no contact was made), Text.
 - 6.3.3. The first line of an email or letter or first statement in phone message should say “Please Respond So We Know this Contact Attempt Was Received”
 - 6.3.4. Request notices of email being opened through email providers programs. (Google “check box”)
 - 6.3.5. Follow up with other methods of contact – if email is used with no response, then try the phone or USPS mail.
 - 6.3.6. For local addresses, go knock on the member’s door.
 - 6.3.7. Take out a month subscription with a provider like whitepages.com, ussearch.com, intelius.com or google.com to research address and phone.
 - 6.3.8. Put notices in newsletters, websites and social media requesting notification of address, phone and email changes.

7. Dues and Dues Collection

- 7.1. Retention can only be achieved if dues are collected in a timely manner. Dues collection might start by mid-August
- 7.2. Have an ongoing contact program in place (i.e., Phone Tree, Mentorship/Buddy system).
- 7.3. Maintain a "how to contact guide" for each and every member
- 7.4. Be sure members are asked to respond to emails, phone calls, texts or letters and if they do not then follow-up is needed. See the **Loss of Member Contact** section above.
- 7.5. Collector or collectors of dues must have good people skills, the drive to keep pursuing members until they make contact, the ability to encourage renewal of membership and unfailing follow up on payments promised and not received.
- 7.6. Modify a Phone Script for contact from the Reinstatement "How To Guide" located on the SAR Membership Committee web page.
- 7.7. Collection committees or teams may be required to complete the collection process for the State Society level or larger chapters.
- 7.8. The original method of application can also be a problem for collection.
 - 7.8.1. Parents or grandparents applied on the family plan and in some cases the member did not even know or recall that he is a member.
 - 7.8.2. It is ideal if State Societies (Registrar, Genealogist, first line sponsor) notify the chapter of these application situations so they can prepare better for dues collections.
- 7.9. Offer more than one method of payment.
 - 7.9.1. Many members will write a check.
 - 7.9.2. Arrange for paying by credit card (possibly annual recurring) or through an electronic system on-line such as [Pay Pal](#), [Venmo](#), [ClubExpress](#), etc. Make available the life membership application.