



Recruitment, Retention and Reinstatement A Reference Guide

Product of the
Membership Committee
National Society Sons of the American Revolution

Derek J. Brown (CA), Chair
L. Stephen Hinson (OH), Vice-Chair

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Recruitment, Retention and Reinstatement

A Reference Guide

The purpose of this reference document on recruitment, retention, and reinstatement is to provide a working document that covers implementation of these National Society objectives. It has been compiled from National Council of State Presidents and National Membership Committee Meeting documents where best practices were presented and discussed and from various State Society documents found in ShareFile. National Membership Committee working sessions using force field (fishbone) analysis were also used to provide further in-depth discussion and analyses on how to achieve these objectives.

The National Membership Committee solicits revisions to this document from any national committee, state society chapter or member. It is desired that this document be the repository of future work from best practices, thereby keeping it as an up-to-date source document.

It is also desired that this reference document be the basis for other forms of training like pamphlets, power point presentations or training videos.

The Compatriots of the Membership Committee are thanked for their efforts spent in developing this document during 2021-2022. It could not have been completed without their dedication, their input representing a wide variety of knowledge and experience and their willingness to support a project of this scope.

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Recruitment

Recruitment boils down to three important tasks. These include creating visibility, personal interaction, and expression of personal experience. The methods to employ these vary. This reference document will deal with these three methods and the practices and experiences that have been used to successfully achieve them. Clear expression of SAR in a way that excites the interest of the new applicant is key to successful recruitment.

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Personal Interaction

Perhaps there is no greater opportunity to recruit someone than one-on-one conversations with prospective members. Face-to-face conversations allow compatriots to be open and candid about their SAR experience and encourage others to participate in the journey.

Relatives and friends are the easiest place to start, especially if they share the same feelings about patriotism and the American experience. Some families share SAR, DAR and C.A.R. memberships and a patriotic family lifestyle.

An inspired member is the best promoter for spreading the word about SAR. The more people he talks to, the more he will be recognized as being identified with the SAR and the higher the likelihood of referrals.

There are misperceptions about what SAR is all about, from the youth who associates the color guard tricorne hat with a pirate to the adult who believes we have a political bias. When talking about SAR, a concise clear story needs to be presented. Interest is created by drawing on personal experience and exciting moments in the member's SAR adventures. The member should not make the conversation all about himself, but should rather seek out and explore the potential member's interest in history, genealogy research, youth education, veteran support, and other areas where SAR has programs. Expressing pride in his organization and his patriotism can be infectious.

State Society Program

The State Society should establish a recruitment program to reach out into sections of the state where chapters do not exist. Many remote areas as well as small to medium sized cities or counties have no SAR chapters. To facilitate recruitment in these areas, the society should invest in some advertising and staff recruitment using members of nearby chapters.

Public service announcements, flyers and posters should be prepared to advertise the Society is holding informational meetings or open houses looking to organize a chapter in the area. Posters should make a connection with the reader regarding their heritage. *"Many revolutionary period families settled in this area. Are you a descendent of an American Revolutionary Patriot? Would you like to find out? Come to an informational meeting at the local library on 'date.'"*

The informational meetings should be staffed with some members in uniform, chapter officers from other locations, a member or two who can assist with genealogy and a registrar. Posters and brochures will also be needed. See *Fairs, Festivals, and Informational Tables* under Community Events below.

Chapter Community Program

Chapters should put together a community visibility program plan of action. The greater the number of methods and frequency of visibility employed, the greater the chances of finding recruits. All the things discussed in this reference document are applicable.

Chapters should create a draft event list at the beginning of year and update as event dates, contacts and information become available. Be sure to contact the event contact person as soon as possible. After having participated in the events for a year or two, the chapter contact usually appears on an event list and are contacted by the event coordinators soliciting the chapter.

Creating and Taking Advantage of Visibility Opportunities

Newspaper Notices - Newspapers are always looking for local community events and human-interest stories for their readers. These are usually FREE for the chapter. All it takes is an SAR Chapter event and a contact (reporter) with the local paper. In many cases the reporter will not be onsite at the event, so writing a draft report with the highlights and pictures may be necessary. Having an established connection with the reporter makes it easier for future acceptance and for securing the presence of the reporter to be on the scene at bigger events like grave markings or appearance of notable personalities at meetings. Keep the reporter informed about upcoming events in case they wish to be on the scene. If they do not show up, then be proactive in sending them the information as soon as possible. Follow up to make sure it is received. Adding the comment, "Will I see it in this week's paper?" helps secure commitment and timing.

Typical newsworthy happenings are color guard participation (parades, presenting colors at local events); flag award presentation; meetings where members, community organizations and leaders, citizens, and youth awards are presented, officers are elected, notable speakers make presentations or are in attendance.

News releases should have an accompanying "boilerplate statement" covering the purpose and make-up of the SAR, solicitation of new members and contact information. The statement needs to be kept short and effective. An example of a statement is:

The Sons of the American Revolution is a nonpolitical male lineage society whose members have documented lineage to Revolutionary War patriots approved by the National Society of the Sons of the American Revolution. For interest in membership, contact the local registrar at [phone number] or [email address]. A chapter genealogist can help you document lineage to a Revolutionary War ancestor at no charge.

Newspaper, Newsletter, Magazine Articles - Articles about the SAR, American Revolution, patriots (biographies) or articles doing genealogical research are all areas where local historical associations, genealogical organizations may be interested in publishing at no charge. Credit to the author being an SAR member of a specific chapter will bring some attention to the SAR and, if a “boilerplate statement” can be added, it will enhance visibility.

Local Radio and Television - Many local radio and television stations exist. They are typically less formal than bigger stations and are interested in having listeners hear about local stories. They also may be interested in interviewing SAR members about the organization and how to become a member. Providing the station with the “Moments in History” CD will help bring visibility and knowledge about to the Revolutionary War period along with SAR recognition.

Advertising - Advertising in newspapers, newsletters or magazines for a fee can become expensive for a chapter on a limited budget. Care should be taken to make sure the advertising is going to reach the right audience. More regional publications may be taken on by the state society especially if the state society is interested in expanding with new chapters.

Public Events

Color Guard – The Color Guard is regarded as the most visible way to present the SAR. Parades provide great visibility. Staying around after the parade and mixing in with the crowd in uniform provides a means of circulating flyers about SAR and answering questions about the organization. Make eye contact with everyone you can, and smile - this gives rise for a return smile and perhaps an opening verbal comment by either party. Then you are off and running. Members circulating in the crowd during the parade can pass out pamphlets like “American Flag Etiquette” and invite the crowd to become members. Make sure a brief “boiler plate” statement with contact info is on the pamphlets.

Fairs, Festivals, and Information Tables - Fairs, festivals and similar events happen frequently. This provides the opportunity to set up information booths. Information booths can also be set up in a large merchandising store like Wal-Mart. Staffing the booth and table with two people with one at a minimum in uniform.

Perhaps a third in uniform could circulate in the crowd with brochures and a request to stop by the booth.

Be sure to make eye contact as stated above in Color Guard. No one is going to come up to a booth where two people are sitting with their eyes down reading a book. Selling raffle tickets also provides the opportunity for person-to-person contact. The item needs to be of good quality and value. Be sure to check out local and state ordinances for gaming, such as lotteries and raffles.

Any booth should have displays. Trifolds or posters with SAR information can be made up and reused. Be sure to add one on 250 Anniversary Celebration. The table should have brochures and when possible Revolutionary War period artifacts. American, SAR, and 250th Flags need to be posted. If more Revolutionary Period flags are available, post them. They can provide opportunity for scheduled presentations every half hour or so on historical flags. Articles for children may include patriotic word anagrams or crossword puzzles. Do not forget to talk about C.A.R. to parents who stop by. Other giveaway items might be pens, pencils, note pads or informational pamphlets like "American Flag Etiquette." Be sure they have contact phone numbers and email addresses on them.

The booth should also have a sign in sheet so people can leave their name to be contacted about membership. A steak dinner for two might be offered to the compatriot with the greatest number of recruits on the sign-up sheet.

Making sure DAR and C.A.R. are invited to participate in these events is important. Having these other two organizations involved completes the recruitment opportunity for the whole family.

Social Media

Websites/Facebook - The National Website under the tab "Join Now!" at the top of the home page provides information on joining. This includes a tab on the "Four Easy Steps" to join, a tab to send a message to a "State Society" contact and a listing of State Society websites. The message option involves an electronic pointer that goes to the email of one primary contact in each state. This is usually the State Society Genealogist or Registrar. These referrals may then be passed on to chapters or may be worked on at the society level.

Each State Society is encouraged to have a website and at a minimum a Facebook page. In either case a tab or invitation to join should be available and provide a link to the State Society Genealogist or Registrar. Many chapters also have websites or Facebook pages and again should provide information and links to contacts for receiving information on joining. Any social media pages or websites need to be maintained with current information.

Any contact coming in electronically needs to be passed on quickly and answered quickly. Note that applicants coming in through the National Website do have the ability to begin filling out an online application. This system is not monitored, and a potential applicant occasionally makes contact wondering why no one has contacted them.

Pod Casts and Blogs – These methods of social interaction appeal to and are used widely by younger adults and children, but not widely used by older individuals. Chapters having younger members may easily and successfully employ their use in recruiting. Chapters not having younger members will need to recruit from an older crowd.

Working with Libraries

Libraries are a great place to hold events with the public. They often plan their programs six months in advance and advertise the events on their website to their patrons, on electronic signs in front of their business, on posters around town and in local newspapers. A venue for speakers, facilities for open houses (best done with a local DAR chapter) and genealogy workshops and racks for distributing brochures are things libraries can offer to SAR Chapters at no charge. Some libraries may hold information table type events or allow you to set up an informational table in the lobby on a Saturday or weekday evening. See *Fairs, Festivals, and Information Tables* above.

With the 250th Anniversary in mind, posting *Keyhole to History* posters in a library will bring daily attention to the anniversary and local chapter.

Speaker Opportunities

Being a speaker at libraries is noted above. There are other opportunities in the community for speakers providing organization visibility and ability to invite membership. Rotary, Kiwanis, genealogy, or historical societies are always looking for speakers. Chapters and State Societies should establish a tab for advertising speakers on their websites or Facebook page. A simple “speakers available” note with subject listing can be placed on local community bulletin board or in local papers.

Each speaking opportunity brings exposure for the SAR and the opportunity to recruit. A brief verbal advertisement about SAR and its objectives should be presented at the end of the talk. SAR brochures and business cards should be available for listeners to pick up. There might be a dinner before the talk or refreshments after allowing the compatriot to engage interested parties about SAR.

Chapters can also find and sponsor notable speakers for these venues to achieve increased attendance and recognition.

SAR/DAR Referral Program

For several years, the National and State SAR Societies have promoted recruitment through the SAR/DAR Referral Program. This program provides awards from National SAR Society to State DAR Societies and from State SAR Societies to State Society DAR or DAR Chapters or to members who have submitted applicants approved by the SAR. This is an ongoing program, and SAR State Societies and Chapters are encouraged to promote its use in obtaining new applicants. The SAR National Society has promoted this program through its DAR Liaison Committee.

This program is often not broadcast or supported effectively from State DAR Societies downward in the organization. SAR Chapters need to work with their local DAR chapters in soliciting participation and making sure DAR participants receive their monetary (national level) or medal (chapter or member level) awards.

In July 2022 the new National DAR President established a National SAR/S.R. Relations Committee. This committee will work with the SAR and S.R. organizations

and the SAR Ladies Auxiliary in promoting membership and coordination of common objectives. This higher level of visibility should enhance support of the SAR/DAR Referral Program.

Tools

Throughout this reference document, tools like brochures, pamphlets, posters, business cards (these could bear a member name or the chapter), give away gifts and handouts are mentioned. The chapter needs to invest in these tools as money permits. National membership brochures can be obtained from the NSSAR National Merchandise office or pdf versions can be downloaded and printed out by members.

Each member should carry business cards on his person so they can be handed out whenever the need arises. Members should also have membership brochures available at home or in the glove box of the car. Keep these tools handy for expected and unexpected occasions.

Barriers to Recruiting

Chapter Issues - As will be presented in Retention section, chapters need to have exciting programs that inspire members to participate. If this is not the case, then the chapter needs to work on their programs. State societies should be familiar with their chapters, recognize chapter issues and be prepared to help assist with creating an inspired chapter. Potential members should be invited to chapter meetings and the chapter needs to be friendly and welcoming.

Meeting Location Problems - Meeting venues, times and distance from the person being recruiting can also present barriers to membership. Chapters using VTC (Virtual Telecommunications) in meeting or holding one or two VTC meetings a year (with a good speaker) may help to sell a prospect who lives a distance away or who has health issues and is house bound. Meetings can also be recorded and placed on venues like YouTube. When two or three prospects live at a distance, then perhaps it is time to make a pitch in the locality to find several other members and start a new chapter.

Children and C.A.R. – Participation in color guard, grave markings and youth programs are all available for children of members. However, their involvement in adult SAR meetings is less entertaining. Supervised parallel meetings might be an option to explore. Getting them involved in C.A.R. when chapters exist is a good opportunity to show the potential applicant there are SAR opportunities for youth.

Application Approval Time- The new applicant may become disenchanted with waiting on the long approval time. It is important to invite him to meetings and getting him involved in events even before application approval. New applicants should also be made aware of the long approval time and the requirements early in the application phase to minimize this potential disenchantment.

Lack of Clarity – As stated previously, there are children who think the member in a tricorne hat is a pirate or adults who think the organization is about the Civil War. SAR members need to be on guard and clarify misperceptions about the organization. Educating the public on the SAR's objectives, programs, and period dress should be presented whenever possible.

Retention

Retention and involvement of members is fundamental to the National Society achieving its objectives and preventing the time-consuming problem of reinstatements. The retention process of a member begins when the application is submitted to the National Society for approval and should continue through the long life of a member. Members should feel welcomed by fellow compatriots and the chapter, and their involvement cultivated whenever possible.

The National Society, State Societies and Chapters are all partners in establishing the environment for retention. In life, every individual has found one or more activities they enjoy, fill their spirit or reinforce their basic beliefs. It is often an activity they want to participate in again and again. It might be the close friendship of another individual, a life mate or child or participation in a sporting activity or a hobby that they just cannot walk away from or an event they want to relive repeatedly. Creating these types of activities within the SAR chapter and developing interpersonal relationships and activities are essential to retention.

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Early Involvement and Training

- Involve the applicant during the approval process
- Introduce member training video and explore participation interests

The sponsor or registrar should make sure the applicant is knowledgeable on the application process and current approval lead times. Applicants have become dismayed or frustrated with the length of time necessary to approve their

application and may also develop a sense of not being welcome. Soon after the applicant's application is received by the National Society, the chapter secretary, the mentor or assigned compatriot should initiate contact with the applicant and begin a welcoming process. The applicant should be encouraged to attend chapter meetings and events as a guest and kept informed of the application status. When chapters hold infrequent meetings, it is more important that contact be maintained.

During the application approval period, the applicant should be introduced to the Member Training Video available on the National Website on YouTube or the Member Orientation Manual. They should be encouraged to explore the SAR programs (youth, veterans, color guard and so on) and identify those programs where they have an interest. The assigned mentor or compatriot should investigate the background of the applicant to determine where their talents could be utilized. Note: In this document, "making contact" means two-way communication. A phone call, or email or USPS mail is sent, and a response must be received. It is important that this mode of contact be incorporated with new applicants/members. Sending a notice without requesting a response is "not making contact" and often means a loss of contact.

Application Approval and Induction

- Notify the new member as soon as possible of application approval and next steps in induction
- Implement actions in Early Involvement and Training in previous section

The National Society issues a postcard notice to the applicant soon after the approved application has been registered. A chapter following an early involvement program as above will be contacting the new member letting them know of application approval and the next steps towards induction. Chapters not implementing an early involvement program should contact the new member as soon as possible after registration. Chapters that hold infrequent meetings and are several weeks or months away from their next meeting should not delay "making contact" (send notice and receive response) with a new member. Not notifying them leaves the new member in a holding pattern and not knowing what will occur next.

Mentoring, Member Training and Involvement

Mentoring and Mentorship-Every chapter is encouraged to implement a mentor program so that every new member has support person that can answer questions and help guide them in becoming trained and involved. Ctrl left click [\[Mentoring Programs\]](#) for details on the mentoring program and Ctrl left click [\[Mentoring Checklist\]](#) for the mentoring checklist. The mentoring program details are a guide to the best mentoring program. Each chapter will need to tailor to their needs and available resources. As an alternative every new member should be assigned a “buddy”. Like the military or swimming buddy systems the buddies keep track of each other and foster brotherhood.

Member Training - Many state societies have implemented mentor training programs. These training programs help introduce new and current members to the organization and some of the national programs available. A generic SAR Orientation Workbook and supporting PowerPoint Workbook Presentation are available on the National website and they can be customized for your state and chapter. Ctrl left click [\[Workbook\]](#) to download the workbook and Ctrl left click [\[Presentation\]](#) to download the workbook presentation.

Member training new or seasoned compatriots is an all the time thing and not everyone will be looking at a training video or reading the member orientation manual. 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.

The National Education Committee is in the process of creating training videos that can be used to train all members, chapters, and officers. These videos will begin to appear in late 2022 and can be viewed through the National Website.

Member Involvement - Getting the member involved in activities and events is key to keeping them interested in the organization and being productive members helping the organization in achieving its objectives. The mentor program and training programs help in exposing the member to the society programs available. The workbook cited above provides a “My Part Participation Summary Sheet” that can be filled out by the member. This offers, at a glance, where the member has

an interest in participation. Chapters can use this sheet to get new members involved.

Involvement requires presenting program options to members asking the member to become involved. An open invitation asking for volunteers almost always does not work. Exploring areas of interest in one-on-one conversations, presenting a program at each chapter meeting followed with one-on-one requests to participate or filling out questionnaires followed with specific requests to become involved where areas of interest are selected are alternative options to securing involvement. A fill-in-the-blank questionnaire that can be customized for each chapter is available by selecting Ctrl right click on [\[Questionnaire\]](#) and also helps identify meeting scheduling and meeting location issues.

Family Involvement - Involvement should go beyond the member. Chapters need to recognize and seek involvement of the wives or life mates by establishing a local Ladies Auxiliary. 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. Involvement in SAR can become a couples or family activity.

Hold Great Chapter Meetings

Chapter Meeting Environment - Chapters take on different environments for meetings. Each chapter needs to explore and be attentive to inputs from members on the venues and environments that create a good meeting. Chapters should periodically reassess chapter needs and not be afraid to make changes. Do not let “we have never done it that way” be a block to trying change.

Listed here are some ideas to explore with members of the chapter. As indicated in the beginning the chapter meeting or event must be inspiring to the members, fun and enjoyable and an experience they want to continue to repeat. If this environment cannot be created by the chapter, the chances of retention begin to diminish.

Food and Drink - Some chapters meet around mealtime at a restaurant for a full meal or at a less formal location and have a bag or box meal. Dessert cookies and drinks might be used as refreshments at an evening meeting. It is good to have starting time for the meeting so those not wishing to participate in a meal may opt

out. Some chapters hold the meeting at one venue and then go to a restaurant for a meal and fellowship following.

Meeting Locations and Room Arrangements - Meeting locations vary with what is available. Restaurants or cafeterias can often accommodate a meeting along with a meal but charges for the room or more expensive meals may need to be considered and may limit member attendance. Local VFW, American Legion or Eagles halls or libraries, churches and Masonic Temples may offer rooms for not-for-profit organizations to meet at no charge. These are often ideal as they may be scheduled into the future becoming a permanent home on a specific day of the month (second Tuesday or third Wednesday for example) or quarterly.

Away from restaurants, meeting rooms can be arranged with simple table or seating in a circle, theater style (seats in rows), or classroom style (seats behind rows of tables). Explore seating arrangements to suit your chapter's comfort and participation needs. Embellish these arrangements with flags, podium, sign in and display tables, projector and computer availability for virtual attendance or speaker and displays like the chapter charter.

Meeting Agenda and Protocol-Meeting agenda should follow the meeting agenda described in the National Handbook Volume IV Protocol-Opening and Closing a Meeting: Meeting Agenda and modified as needed to meet the needs of the members. The business meeting may be separated out and held before or following the meal and/or speaker so those not wishing to be a part of the business meeting or guests may leave. Business meetings could be held more or less frequently and on a different schedule. Every meeting should include the display or Color Guard presentation of the National Flag, SAR Flag, Pledge to the Flag, the invocation and benediction, and the SAR Pledge and Recessional.

Inclusion and Welcoming Environment-All compatriots should be presented with an environment where they are welcomed and feel included in the chapter, chapter events and meetings. This would include:

- Open meeting room early so members can meet and greet.
- Preassign host duties to two or three members who greet and introduce new attendees to other members and wives.
- Go around the room and have attendees introduce themselves.

- Make sure all members receive personal contact about the meeting (not just an email notice).
- Make sure all members are invited and encouraged to participate in every meeting and event.
- Watch for and make every effort to prevent cliques from forming.

Exciting and Educational Programs and Speakers-

- Forming program committee relieves burden of one person having full responsibility
- Challenge members to submit ideas or recommend speakers

One of the best draws you can have would be finding exciting speakers who can enlighten and entertain the members. Certainly, the focus should be on our patriotic, educational, and historical objectives of the organization. However, speakers especially 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.

*Intra-chapter Programs/Support-*The State Society through its organization should develop and promote participation between chapters. Sharing speakers and resources and creating a larger audience for special speakers should be explored and implemented.

*Optional Virtual Participation-*In this new age we have learned to become involved by meeting face-to-face electronically. Offering the opportunity to participate in a meeting virtually for house bound members, out-of-town members or those with a time crunch to participate in the meeting can increase participation and retention.

Fostering National Society Programs

Every State Society and Chapter needs to support as many of the National Programs as possible. These programs get at the heart of the SAR objectives of Patriotism, Education, and History and extend opportunities for involvement and supporting retention. These programs and additional information are as follows (see next page):

- Color Guard select Ctrl left click [\[Color Guard\]](#) for additional information.
- Youth Programs select Ctrl left click [\[Outreach Education\]](#) for additional information.
- 250th Anniversary Program select Ctrl left click [\[250 Anniversary\]](#) for additional information
- American Flag Award select Ctrl left click [\[Flag Programs\]](#) for additional information.
- Grave Marking/Patriot Graves Program select Ctrl left click [\[Patriot Grave Marking\]](#) for additional information
- Patriot Research System click select Ctrl left click [\[PRS\]](#) for additional information and Ctrl left click [\[PRS Website\]](#) to access the website
- Veterans/Veterans Support Programs select Ctrl left click [\[Veterans Programs\]](#) for additional information
- Wreaths Across America Program select Ctrl left click [\[Wreaths Across America\]](#) for additional information
- Donations and Project Funding click select Ctrl left click [\[SAR Foundation\]](#) for additional information

Loss of Member Contact

- Losing contact is an inevitable when compatriots never participate

Losing track of a compatriot is easy when they do not attend meetings and leave the area without notice. A variety of methods exists to re-establish contact.

- Use a mentor or a “buddy system” so active members are interconnected with those not so active and can assist in keeping contact.
- Initiate a program of more frequent informal contact (if no response, then no contact was made).
- Put notices in newsletters, websites and social media requesting notification of address, phone and email changes.
- Request notices of email being opened through email providers programs. (Google “check box”)
- 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”
- Follow up with other methods of contact – if email is used with no response, then try the phone or USPS mail.

- Take out a month subscription with a provider like whitepages.com, ussearch.com, intelius.com or google.com to research address and phone.
- For local addresses, go knock on the member's door.

Handling Personal Conflicts/Family Requirements.

- Understand existence of family requirements and attempt to find work around solutions

Younger members who have careers, education requirements and young families often have difficulty balancing those demands with participation in SAR. Chapters need to explore what involvement would work best for these members. Finding meeting times and offering programs that entice these members can be difficult. Special effort and attention to their needs will be required to understand how to keep them involved. Perhaps the member does not have time to schedule and get to meetings but would be willing to work on an at home SAR program like filling in the Americanism Scoresheet, volunteer for the Patriot Research System (PRS) or making calls to support youth programs. Having a meeting one or two times a year at a different time or location to meet the needs of younger members should be explored.

At a minimum, keep them 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. There are several free online electronic invitation apps that can help automate the meeting invites.

Dues and Dues Collection

- Dues collection requires people skills and the drive to follow through on making contact and closing the collection

Retention can only be achieved if dues are collected in a timely manner. The collection process varies from state to state and chapter to chapter. Collection may be made by the state organization or performed by the chapter or both. Collection is a lot easier in small chapters where everyone knows everyone else and much harder in large chapters where many compatriots never attend meetings and changes to email addresses, phones and street addresses go unnoticed.

Responsibility for collection may lay with the Registrar or Treasurer or special designee or by a committee. Whoever the collector or collectors are, they must have good people skills, the drive to keep pursuing members until they make contact, ability to encourage renewal of membership and unfailing follow up on payments promised and not received.

Larger chapters or state societies, depending on where dues collection originates, need to take into account the effort required. Collection at state society level or in larger chapters may require committees or teams to complete the collection process. At some point in time frustration or burn out may occur and at that point effective collection will stop if adequate supporting manpower is not added.

Lost or bad contact information is an ever-present problem. It is good to have an ongoing contact program in place. Be sure members are asked to respond to emails, phone calls or letters and if they do not then follow-up is needed. A member who is not acknowledging being contacted or not responding to meeting or event notices should be suspect for lost contact. That is the time to make sure the member can still be contacted and a response from him is attained and re-verification of contact information confirmed. See the **Loss of Contact** section presented earlier in this document.

The original method of application can also be a problem for collection. Parents or grandparents applied on the family plan and in some cases the member did not even know he was a member. 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.

Payment methods can also become a problem. Many members still do not have a problem writing a check. Others would rather pay by credit card or through an electronic system on-line like Pay Pal. Chapters or state societies need to be aware of these payment issues and may need to offer more than one method of payment.

Time and Meeting Location

Members cannot always be placed close to where chapters normally meet or the applicant asks to be placed in their patriot ancestors home state or burial location.

When this occurs, chapters need to explore alternatives like virtual participation or holding a meeting closer to the member's location.

Time meetings are held can also be a problem for many members. Members are both retired or still have a work schedule and there may be shift issues.

These issues can be explored one on one with members especially those who are not attending. Another way to understand and explore time and meeting location problems is by use of a questionnaire where data can be collected and evaluated by chapter officers. A fill-in-the-blanks questionnaire that can be used by chapters can be obtained by entering Ctrl and right click on [\[Questionnaire\]](#).

Members residing in other states should be encouraged 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.

Reinstatement

Reinstatement of a member occurs when there is a failure to keep the member through effective retention. When retention is 100%, no reinstatement effort would be required.

Reinstatement is a manpower time consuming driven process often involving recruitment efforts including persuasion, trying to locate (email, address, phone) members who have become inactive with contact lost and follow-up after contact has been made. It often becomes frustrating and, in many cases, would have been more rewarding if the effort would have been put into recruiting new members or retaining existing members.

This section on Reinstatement covers:

- P23 Before Reinstatement is Required
- P24 Maintaining a List of Inactive Members
- P24 The Reinstatement Process
- P26 Finding Inactive Members
- P27 Finding the Right Person(s) to Lead Reinstatement
- P27 Dealing with Financial or Family Problems
- P27 Incentives and Penalties
- P28 Revitalization of Chapters
- P28 Follow-up, Persistence, Higher Level Contact
- P28 Gaining Interest in Coming Back
- P29 Non-Responsive Inactive Members

Before Reinstatement is Required

- Keep in positive contact with all members

It is important to maintain positive contact with members. Always announce meetings and request an R.S.V.P. with a yes or no response. If an R.S.V.P. is not received, then send a second request for R.S.V.P. If the second request is not received it is time for action by an appropriate person: mentor, compatriot friend, sponsor or chapter officer to make sure nothing has happened and to solicit any problems from the member. If mentoring is not used, then use the “buddy system”

where everyone has one or two buddies keeping contact with each other. Whatever contact is made, make sure contact is acknowledged and email, phone and address information are correct.

Maintaining A List of Inactive Members

- Chapter or state society needs to maintain list of inactive members

Dues collection may be done by the Chapter and passed on to State Society or may be done by the State Society either as part of the annual reconciliation of members. It is important to maintain a list of members who became inactive as soon as reconciliation is done. Using a spread sheet or data base program is ideal and should contain all of the current member information and including a status column indicating last year active. The national society does not maintain a file of inactive members with the date they became inactive. It is very important for the chapter or state society to maintain a list.

The Reinstatement Process

- Do reinstatement process every year
- Move up from email to phone to letter in attempts to get response
- Enlist help from key people to increase effectiveness

Every year following dues collection, the Chapter or State Society should undertake to contact all members who became inactive at the beginning of the year. That effort should be extended every other year to all members who became inactive two to five or six years prior. An alternative is to break the years in half and do half one year and another half the next.

Depending on how aggressive the chapters and societies are, the typical reinstatement achieved will range from 5% to 15% of the members who became inactive going back 5 or 6 years.

- The process involves attempts to make contact using various methods until contact is made

Email - Perhaps the first pass is the easiest. It involves emailing every inactive member and soliciting their reinstatement by paying dues for this year. To make sure positive contact is made, consider the following introductory statement. "PLEASE RESPOND BY RETURN REPLY TO THIS EMAIL SO I WILL KNOW IT WAS RECEIVED."

The email can be simple:

"Our records indicate you have not renewed your membership and you are now listed as inactive. If you believe dues have been paid, please let me know how they were paid so we can follow-up. If they have not been paid, we would like to have you back. Your dues are \$_____ for National \$_____ for State and \$ _____ for Chapter. Make check payable to order of _____ and mail to ___(name)___, ___(address)_____.
"

If email is not acknowledged by return reply, follow up two more times by email. If email is acknowledged, then maintain contact until the dues payment is received. A sample letter format is available on the NSSAR website; Ctrl left click on [\[Retention\]](#) for this document.

Phone – If email fails or no email is available, then phone contact is the next step. Phone courtesy is important. It is a good idea to write out an introductory statement and on who you are and why you are calling. This will keep you on track with the message you want to convey, especially when talking to a message machine. Whether you make contact or have to leave a voice mail, be prepared to respond. The response can be similar to the email above. Leave a phone message when necessary but be sure to ask for a positive contact return phone call response. If phone message is not responded to and you believe the phone is a cell phone, try leaving a text message to call. If no response, make two more attempts.

Letter – When email and phone calls fail, it is time to use the USPS to see if letter can be delivered. Again, be sure to ask for a response by email, phone or letter making sure all are listed at top or end of letter.

Sending letters involves costs for stationary, ink and mailing so attention needs to be paid to budget restrictions or proper approvals. Sending the letter with a stamped, addressed return envelope can also be tried with added cost. In addition,

a 3" X 5" card that fits into the return envelope requesting response to a few (limit to 3 or 4 brief "yes or no") questions and a request verification of address, phone and email can be included. A space for written comments and a request to return with a YES or NO I want to continue membership can also provide interesting responses. At least you may get a response with the 3"X 5" card even if dues are not paid.

Two samples of letters are provided at the end of this reference section.

Finding Inactive Members

- Use online services and local contacts to find missing inactive members

When the email and USPS mail are not deliverable, and the phone message indicates a non-working number, then contact is lost and needs to be re-established.

Personal Contacts - One of the first attempts to regain contact should be through the mentor or sponsor. Next would be through known friends or relatives. If the inactive member is local, then drive over and knock on the door being sure to leave a message in the mailbox or taped to the door. Do check the National Data base. It might be they informed the national offices of address, phone or email changes instead of the chapter or state.

Internet Services - Services for locating people are available on the internet. Most of the time these are paid for services. Often these services offer you a 10 or 20-day free trial. You do need to provide a credit card number up front. The free period may be enough to search if you have them all listed out and ready to search. Some of these services allow you to purchase by the month. The services often list all of the known previous phone numbers and home addresses along with names of people associated with the person. This gives you the opportunity to effectively identify the right person. Two companies that supply this service are **whitepages.com** and **intelius.com**. Google for other possible sources.

Finding the Right Person(s) to Lead Reinstatement

The reinstatement process can be performed by a hard-working individual or a team of individuals. The individual or team needs to have good interpersonal skills, solid attitude, have patience, be good conversationalist and listener and persuasive. They need to be tenacious and unyielding in their quest to find a missing inactive member and in securing the reinstatement.

Dealing with Financial or Family Problems

When financial or family problems are cited as reasons for becoming inactive, the soliciting compatriot should remember he is not a financial planner or psychologist. Its best to be empathetic and be a good listener. Knowing what the problems are, you might be able to suggest ways to be involved in SAR.

- Perhaps an older inactive member can attend by virtual means
- Look for ways to keep them involved through social media or patriot research
- LinkedIn may be applicable for certain groups
- Look creatively on how to get Junior members involved including those in C.A.R.

Incentives and Penalties

Incentives are always possible; however, the chapter or society needs to watch out for overdoing it. Offering to pay for a second year if the inactive member reinstates for one or two years may be incentive for other members to drop membership and reinstate to get the free year. It could also foster resentment by those members who pay in a timely manner. Holding the reinstatement program in July and August may be a better option. Reinstatements registered after September 1st will allow the inactive member to have a membership for the last four months of the current year plus the following year for 16-month period.

Having a policy where a penalty or fine has to be paid to reinstate may provide some incentive for members to pay dues on time. But, making them pay a stiff penalty or fine to be reinstated may embolden an inactive member to stay inactive. Many adults do not like being treated like children or punished for missing a due date.

Revitalization of Chapters

Chapters may lose members because they have become stale and no longer put together inspirational programs that keep members enthusiastic. Chapters need to look at themselves and see if they need to reinvent their programs to be challenging and inspirational. See Hold Great Chapter Meetings in the Retention section of this document.

Follow-up, Persistence, Higher Level Contact

Follow-up is important. At some point the inactive compatriot may get tired of your persistence and finally give you a response. We would want to believe any inactive compatriot owes the chapter and you the courtesy of a response. But, be prepared for an irate answer.

Escalation – At some point in time it could become more effective to get a third person involved to gain contact and secure dues payment. Key people like the application sponsor, mentor, chapter president, known compatriot, DAR sponsor or a compatriot friend can be solicited to make a call or send an email on your behalf can help achieve contact. A final letter signed by the State President or States National Trustee can also raise the attention level of the inactive member.

Gaining Interest in Coming Back

Emails and phone messages should be kept short. However, brief messages on specific subject matter could facilitate friendly conversation and peak interest in a society program. Letters can expand and explore a particular subject. Consider subjects like:

- Researching ancestors on the SAR Patriot Research System (PRS)
- Announcing the 250th Anniversary Program or upcoming 250th Anniversary events
- New or inspiring meeting format, speaker series, or well-known speakers

As mentioned, before you might want to write out a script or prepare an outline on the subject before making a phone call. Be sure to stay away from current political issues.

Non-Responsive Inactive Member

When significant effort has been applied and the inactive member is still non-responsive it might be time to give it a rest. Every few weeks give the email and phone call a try. Keep looking for possible key people who might be able to make contact.