

# Identifying, Reaching, and Recruiting Participants<sup>1</sup>

## Session Overview

Offering a matched savings account for the purposes of buying a home, starting a business, or paying for education and training should be a product that sells itself. Many AFI Projects, however, find that recruiting participants is a challenge in the early stages. In this workshop, you will identify groups in your community or in your service area that could be the focus of your recruitment efforts. You will also learn a framework for developing a specific plan for reaching members of those target markets you plan to serve. This session will focus on identifying low-cost methods to effectively reach and engage people in your target markets.

## Purpose

To provide you with a methodology for identifying and describing your AFI Project's target markets and developing an efficient and effective promotional plan to reach and recruit individuals from your target markets to participate in your AFI Project.

## Objectives

**By the end of the session, you will be able to:**

1. Define marketing and describe its relationship to designing and operating an AFI Project.
2. Explain and apply the marketing mix.
3. Define recruitment and explain the reasons some AFI Projects have had difficulty recruiting.
4. Explain and apply the seven-step process for developing a recruitment plan.
5. Describe the relationships between recruitment, AFI Project time limits, account design, and participant retention.
6. Identify and describe target markets and market segments.
7. Differentiate between eligibility criteria and targeted recruitment.
8. Differentiate between features and benefits.
9. Construct benefit-centered marketing messages for specific target markets.
10. Describe five promotional strategies and at least one tactic for each, and select those that are most effective to reach your target markets.
11. Explain and use two methods for evaluating the efficacy of your recruitment plan.

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<sup>1</sup> This module is one of several developed by the Office of Community Services to help Assets for Independence Demonstration Program grantees to increase their implementation capacity. This and other module workbooks and slide presentations may be accessed from the AFI home page: [www.acf.hhs.gov/assetbuilding](http://www.acf.hhs.gov/assetbuilding), or by contacting the AFI Resource Center: [afiprogram@acf.hhs.gov](mailto:afiprogram@acf.hhs.gov) or 202-401-4626. These materials are provided free of charge, but OCS would like to hear from users when they are used and learn how they could be improved to serve the field.

# Marketing: A Key Organizational Function

Before discussing target markets and recruitment, it is helpful to understand that *identifying and understanding target markets* and *designing and implementing a recruitment plan* are two pieces of the organizational function of marketing.

Marketing is a misunderstood term and concept. Many people equate marketing with advertising. Advertising is paid promotion of a product or service and is only one part of marketing. In addition to misuse of the term, confusion about marketing is often compounded by the many definitions of marketing:

- The American Marketing Association defines marketing as *an organizational function and a set of processes for creating, communicating, and delivering value to customers and for managing customer relationships in ways that benefit the organization and its stakeholders.*
- Miriam Webster's Dictionary defines marketing as *an aggregate of functions involved in moving goods from producer to consumer.*
- Tim Cohn, marketing consultant and author, defines marketing as *finding out what your customers want and then giving it to them.*

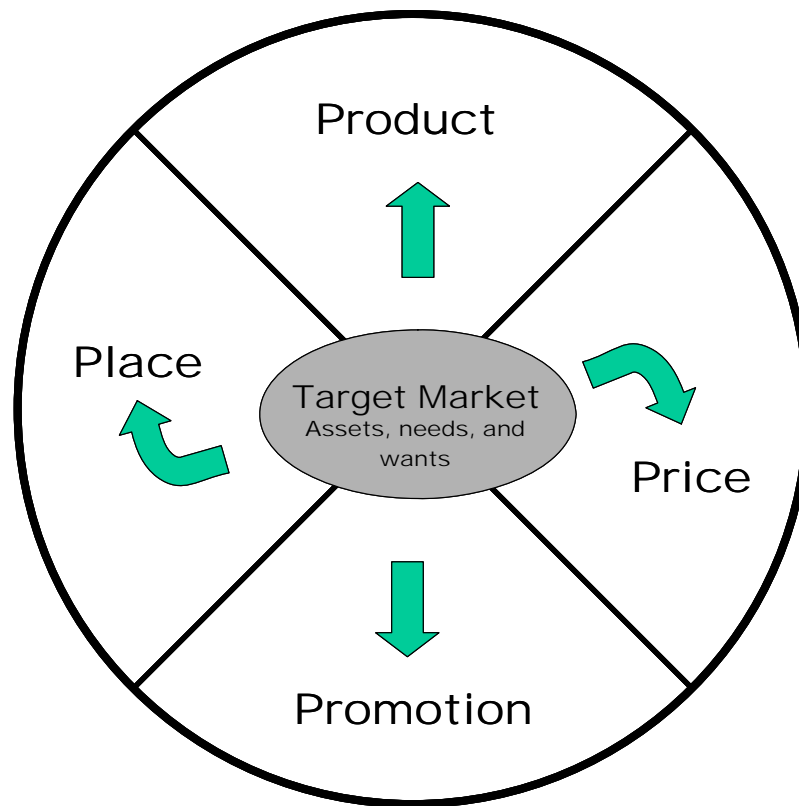
For our purposes, we are going to use the following definition:

- ***Marketing is planning to have the RIGHT PRODUCT in the RIGHT PLACE at the RIGHT TIME at the RIGHT PRICE for the RIGHT PEOPLE.***

## How does this apply to an AFI Project?

- Are AFI Project services, including the IDA, designed right?
- Are AFI project services and the IDA itself accessible to those for whom it is designed?
- Are AFI services offered at a "price" (or direct or indirect costs) that the people will accept?
- Are AFI project features being communicated in a way that appeals to people?
- Is the project marketed at times and places people are most likely to hear the message?
- Is the project designed for and being delivered to the right group of people?

## The Marketing Mix



### The process of marketing in an AFI Project is about:

1. Identifying your **TARGET MARKETS**—their present assets, needs, and wants.
2. Designing your **PRODUCT** or **SERVICE** so that it builds on the assets of the **target market members** and satisfies their needs and wants, resulting in some benefit that is clear to them.
3. Offering the product or service at a **PRICE** or *absence of direct or indirect costs* that is accessible and acceptable to **members of your target markets**.
4. Providing the product or service in an accessible, convenient, and appropriate **PLACE** for **members of your target markets**.
5. Communicating the benefits and features of the product or service in a way that will cause **members of the target markets** to “buy” the product—**PROMOTION**.

This session is going to focus on two pieces of the marketing mix:

**1) Target Markets**

**2) Recruitment**

Both will be covered in the context of developing a recruitment plan.

*What is recruitment?*

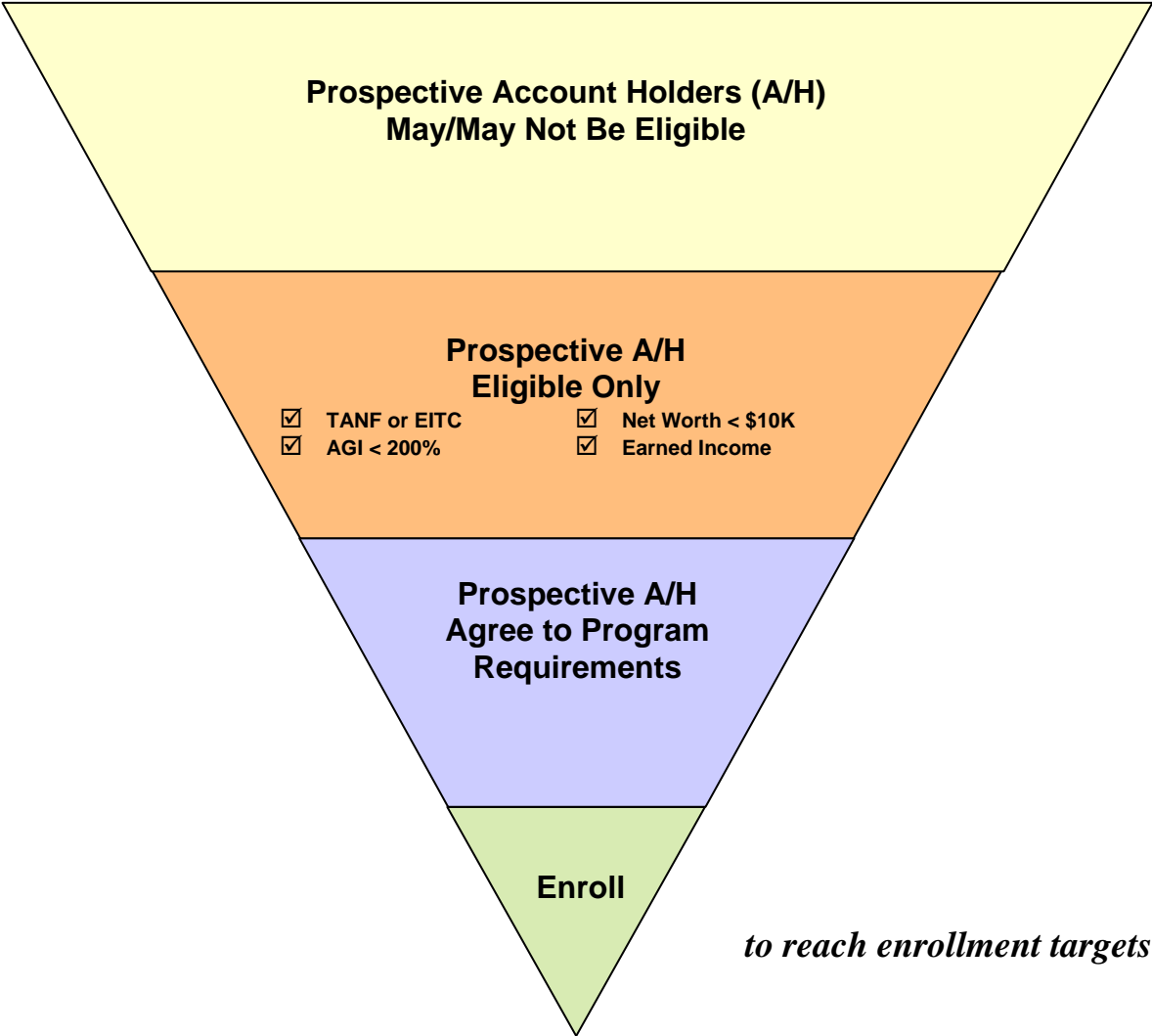
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*Why have so many organizations had a difficult time recruiting participants into AFI Projects and IDA programs?*

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|-------|-------|
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*How many people must you reach here...*



*to reach enrollment targets here?*

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## Recruitment and AFI Project Time Limits

In starting an AFI Project, you know that you have five years to complete your project. This may seem like a lot of time. It is, if everyone you recruit in the first year saves on schedule, stays in the project, and purchases assets without a problem. If, however, you have a hard time enrolling clients, you could find yourself in the third or even later years of your project with only a small number of your projected accounts filled.

Furthermore, you need to remember that clients enrolling in the third year have only a portion of the time you may allow in your policies to save, complete all of the course requirements, and, in many cases, clean up credit problems. Another point to keep in mind is that participants cannot actually save until the end of the AFI Project.<sup>2</sup> They need to have purchased their asset by the end of the program. As a result, your recruitment efforts need to be on track and operational during the first year of the AFI Project.

Following is an example. Review it and think about the implications for the design of your AFI IDA Project, such as the structure of your accounts, your recruitment efforts, your retention strategies, the process you are planning to prepare your account holders to purchase their assets, and your asset purchase policies and procedures.

| Target Number of Clients:150                               | Year 1                |                        | Year 2   | Year 3                 | Year 4 | Year 5   |                                       |
|--|-----------------------|------------------------|--|------------------------|--------|--|---------------------------------------|
|  | 6 months              | 6 months               | <i>Savings and Participation Period of AFI Project</i> |                        |        | 6 months   | 6 months                              |
|  | <i>Project Design</i> | <i>Start Program</i>   |  |                        |        | <i>End of 4 year savings for people enrolled in year 1</i> | <i>Asset Purchase &amp; Close Out</i> |
| <i>Enrolled</i>  |                       | 100                    | 100  | 100                    |        |  |                                       |
| <i>Dropped Out</i>   |                       | 50                     | 50   | 50                     |        |  |                                       |
| <i>Remaining</i>   |                       | 50                     | 50   | 50                     |        |  |                                       |
| <i>Time to Save</i>  |                       | <b>4 years to save</b> | <b>3 years to save</b>                                 | <b>2 years to save</b> |        |  |                                       |
| <i>If saving according to policy, maximum value of IDA</i> |                       | \$6,000                | \$4,500  | \$3,000                |        |  |                                       |

<sup>2</sup> There are additional implications for enrolling participants at the midway point to replace people who have dropped out of the program. For example, if your minimum monthly deposit is \$25, will the individual following program policy have a chance in two years or less of actually acquiring enough money in his/her IDA to invest in a chosen asset? There is also the matter of limited staff resources to duplicate recruitment and training activities.

| Target Number of Clients:150 | Year 1 |  | Year 2 | Year 3                               | Year 4  | Year 5 |  |
|------------------------------|--------|--|--------|--------------------------------------|---|--------|--|
|                              |        |  |        | Is this enough to acquire the asset? | Is this enough to acquire the asset?<br>Is it enough time to finish all requirements? |        |  |

SAMPLE  
POLICIES:

**Minimum monthly savings: \$25/month**

**Maximum savings period: 4 years**

**Match rate: 4:1 (2 AFI, 2 non-federal sources)**

**Match cap: \$1200**

**Full Value of IDA if saving according to program policy: \$6000**

## Golden Rule of Account Design

**Minimum Monthly Deposit**

**+**

**Match *during the Savings Period***

**=**

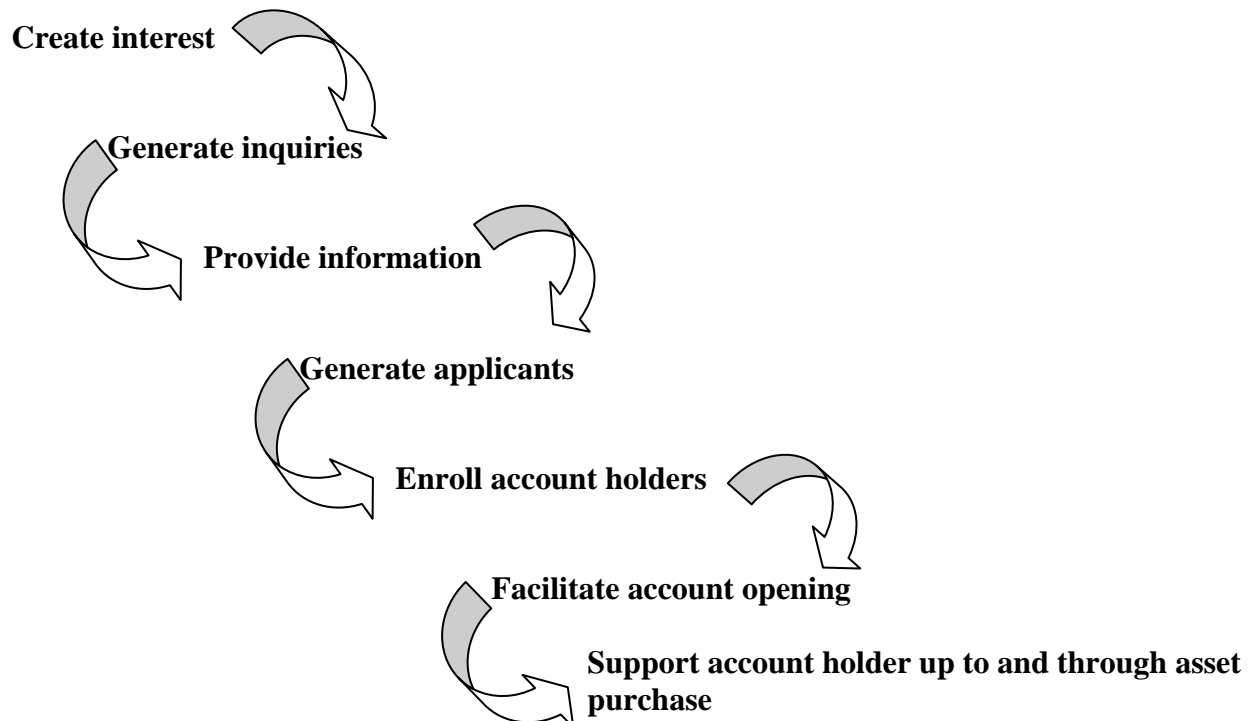
**Account holders with funds likely to be sufficient to acquire their selected asset**

# Developing a Recruitment Plan

There are seven steps to developing a recruitment plan for your AFI Project. You may have already done Step 1—figuring out your target markets—most likely while designing your AFI Project. If you did not, however, it is a critical step.

- Step 1: Understand Your Target Markets**
- Step 2: Set Recruitment Objectives**
- Step 3: Determine the Features and Benefits of What You Are Offering**
- Step 4: Develop a Clear, Concise Message for Each Target Market**
- Step 5: Determine the Best Ways to Promote Your AFI Project**
- Step 6: Implement Your Recruitment Plan**
- Steps 7: Evaluate the Results of Your Recruitment Plan**

The purpose of your recruitment plan is to create interest in the AFI Project, which leads to inquiries, which leads to applicants, and, if implemented well, leads to successful account holders.





## STEP 1: Figure Out Your Target Markets

*What is a market?*

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*What is the market for IDAs?*

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*What is a target market?*

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*What are examples of target markets you may serve or are serving with your AFI Project?*

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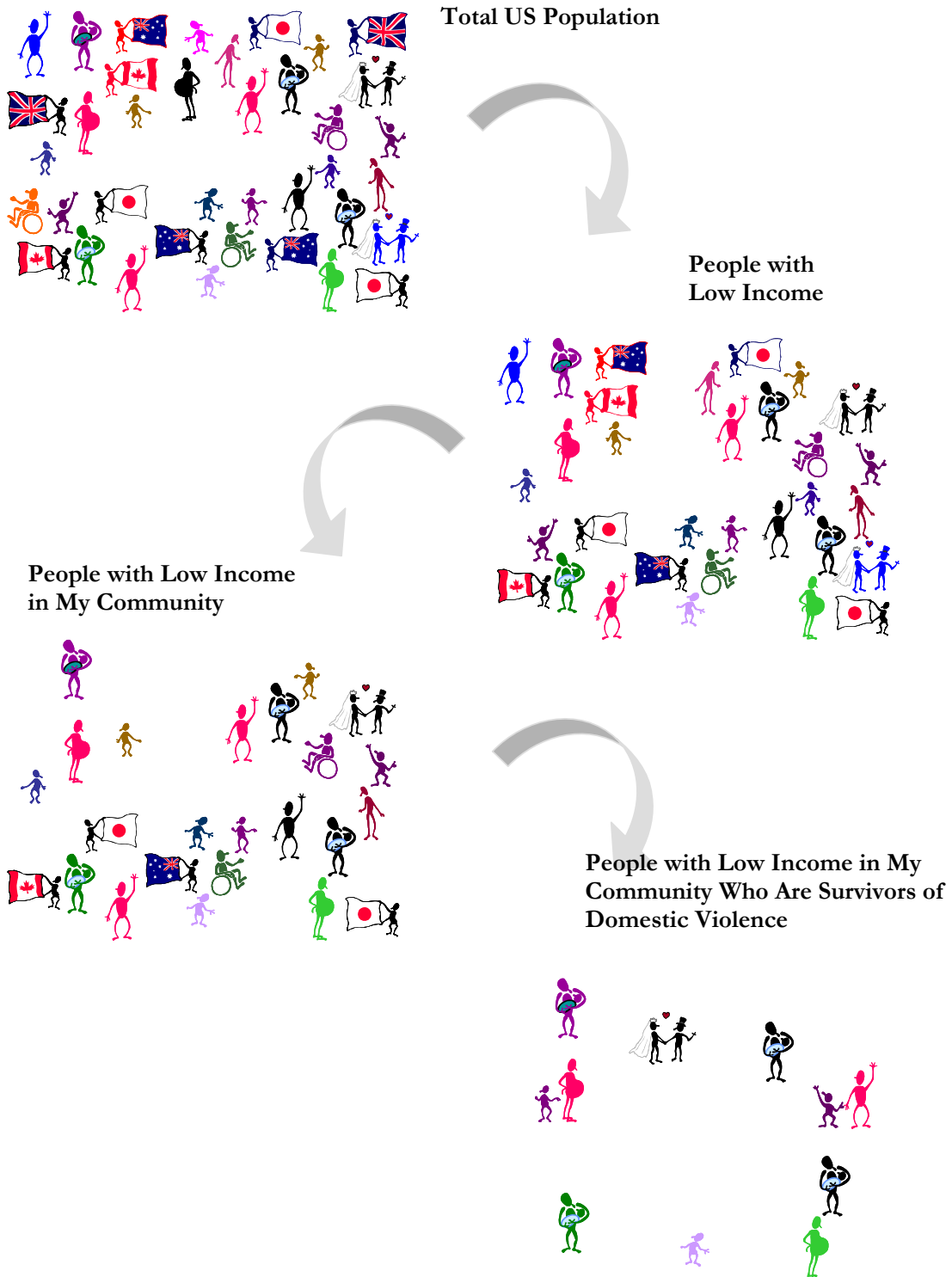
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### Some Examples of AFI Project and Other IDA Program Target Markets

- TANF recipients
- Low-income families with children
- Youth transitioning from foster care
- People with developmental disabilities
- Senior citizens
- Residents of particular neighborhoods, such as Empowerment Zones or Weed and Seed Program sites.
- Survivors of domestic violence
- Exoffenders transitioning out of incarceration
- Migrant farm workers
- Seasonal workers
- Entry-level employees in selected industries
- Members of some unions
- Families already receiving services from your organization.

**Key Point:**

Focusing on “target markets” or “market segments” does not mean that an organization, program, or project would serve only one of these. It is simply a mechanism to better meet the needs of the individuals served by your AFI Project and be more effective and efficient with services and communications.



## ***What is the difference between eligibility criteria as set forth in the AFI statute and a target market?***

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### **National Eligibility Criteria for AFI**

Irrespective of the target markets you choose to serve with your AFI Project, all participants must meet the following eligibility criteria:

1. Must be a member of a household that **qualifies for TANF** in their state.

**OR**

2. Has a **household Adjusted Gross Income<sup>3</sup> equal to or less than 200 percent of the poverty level.<sup>4</sup>**; *or* a household income that makes them **eligible for Earned Income Tax Credit; and**

Must have a **household net worth<sup>5</sup>** that does not exceed \$10,000, excluding the value of the primary dwelling owned by a household member and one vehicle owned by a household member.

Participant contributions to their Individual Development Accounts must come from **earned income**.

In addition to these threshold eligibility criteria, AFI encourages projects to serve individuals who are:

- Predominantly from households in which a child (or children) is living with the child's biological or adoptive mother or father or the child's legal guardian.<sup>6</sup>
- Residing within one or more relatively well-defined neighborhoods or communities, including rural communities, that experience high rates of poverty or unemployment.<sup>7</sup>

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<sup>3</sup> AGI is defined as your income from all sources, including wages, salaries, tips, taxable interest, ordinary dividends, taxable refunds, credits, or offsets of state and local income taxes, alimony received, business income or loss, capital gains or losses, other gains or losses, taxable IRA distributions, taxable pensions and annuities, rental real estate, royalties, farm income or losses, unemployment compensation, taxable social security benefits, and other income, *minus* specific deductions. Adjusted gross income is the amount shown on line 4 of IRS Form 1040EZ, line 22 of Form 1040A, or line 35 of Form 1040. For more information, please see the IRS website: <http://www.irs.gov>.

<sup>4</sup> See the HHS website for Poverty Guidelines: <http://aspe.hhs.gov/poverty/05poverty.shtml>.

<sup>5</sup> The net worth of the household at the time of determination of eligibility may not exceed \$10,000. This is the aggregate market value of all assets that are owned in whole or part by any member of the households *minus* obligations or debts of any member of the household, but not including the primary dwelling unit or one motor vehicle owned by a member of the household.

<sup>6</sup> Public Law 105-285, 105<sup>th</sup> Congress, Title IV—Assets for Independence, Section 405 (d) (1).

<sup>7</sup> Public Law 105-285, 105<sup>th</sup> Congress, Title IV—Assets for Independence, Section 405 (d) (3).

## Target Market Analysis Worksheet

Take some time to think about who you will target for your AFI Project. Try to be as specific as possible. This will help you to:

- Develop a targeted recruitment plan
- Develop a project that meets the needs of the people you are serving
- Effectively choose and evaluate project partners
- Create a bigger impact with your resources

|                                |   | <b>Target Market 1:</b> | <b>Target Market 2:</b> |
|--------------------------------|---|-------------------------|-------------------------|
| <b>Demographic Information</b> | <b>Ages of individuals served by the project</b>  |                         |                         |
|                                | <b>Race/Ethnicity</b>   |                         |                         |
|                                | <b>Languages</b>  |                         |                         |
|                                | <b>Gender</b>   |                         |                         |
|                                | <b>Literacy level/grade level/reading level</b>   |                         |                         |
|                                | <b>Stage in the family life cycle (single, family with young children, divorced with older children, retired, etc.)</b> |                         |                         |
|                                | <b>Geographic location</b>  |                         |                         |
| <b>Economic Information</b>    | <b>Income Level</b>   |                         |                         |
|                                | <b>Employment Status (employed full time, part time, steady employment, seasonal)</b>                                   |                         |                         |
|                                | <b>Sources of Income</b>  |                         |                         |
|                                | <b>Asset Ownership—Level of Asset Ownership and Types</b>   |                         |                         |

|                               |   | <b>Target Market 1:</b> | <b>Target Market 2:</b> |
|-------------------------------|---|-------------------------|-------------------------|
|                               | <b>Relationships with Financial Institutions</b>  |                         |                         |
| <b>Target Market Analysis</b> | <b>Other characteristics they have in common</b>  |                         |                         |
|                               | <b>Characteristics they may NOT have in common</b>  |                         |                         |
|                               | <b>Resources they have and bring to the project</b>   |                         |                         |
|                               | <b>What they may need from the AFI Project</b>  |                         |                         |
|                               | <b>Financial education needs</b>  |                         |                         |
|                               | <b>Where do they spend their time? Work, neighborhood, service agencies, faith communities?</b>   |                         |                         |
|                               | <b>Where and how do they get information? Who or what are perceived as credible sources of information? Think about potential referring partners.</b> |                         |                         |

## Market Segmentation

Even after completing a target market analysis, you may find the target market is too broad. If this is the case, you may want to further segment the market based on

- 1) Use of services
- 2) Response to marketing communications

In the “Target Market Analysis Worksheet,” look at the “**characteristics they may NOT have in common**” section for ideas on segmenting the target market.

**Target Market 1: People with Low Income in My Community Who Are Survivors of Domestic Violence**

|   | <b>Segment 1:<br/><i>In Transitional Housing</i></b>                             | <b>Segment 2:<br/><i>With Children</i></b>                            | <b>Segment 3:<br/><i>Spanish Speaking</i></b>                             |
|---|--|---|---|
| <b>Use of Services</b>                      | Determine legal issues to ensure perpetrator does not have access to IDA         | Provide childcare on site OR provide vouchers for child care          | Find financial institution that will accommodate Spanish-speaking clients |
|   | Provide all enrollment services and classes at the transitional housing facility | Possibly hold classes during the day while survivor's spouse is works | Find out relevant cultural issues—domestic violence & asset ownership     |
|   |  |   |   |
| <b>Response to Marketing Communications</b> | Work with staff to recruit; give them brochures and applications                 |   | Ensure recruitment materials are written in Spanish                       |
|   |  |   | Have Spanish-speaking staff person meet with prospective account holders  |
|   |  |   |   |

## Market Segmentation Worksheet

**My Target Market 1:** \_\_\_\_\_

|                              | Segment 1: | Segment 2: | Segment 3: |
|------------------------------|------------|------------|------------|
| <b>Use of Services</b>       |            |            |            |
|                              |            |            |            |
|                              |            |            |            |
| <b>Response to Marketing</b> |            |            |            |
|                              |            |            |            |
|                              |            |            |            |

**My Target Market 2:** \_\_\_\_\_

|                              | Segment 1: | Segment 2: | Segment 3: |
|------------------------------|------------|------------|------------|
| <b>Use of Services</b>       |            |            |            |
|                              |            |            |            |
|                              |            |            |            |
| <b>Response to Marketing</b> |            |            |            |
|                              |            |            |            |
|                              |            |            |            |

## Step 2: Set Recruitment Objectives

*What is the overall goal of recruitment?*

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Before you make any other decisions about how you are going to recruit participants for your AFI Project, review your program application and confirm or revise the objectives and timelines for your recruitment activities. These will give you targets for success. For example:

- Generate 30 inquiries by the end of February.
- Register 18 people for orientation in March.

This will help you to:

- Select the most appropriate methods for recruiting
- Evaluate, look at benchmarks to determine whether or not your recruitment activities are successful.
- Utilize resources more efficiently

### Objectives for Recruitment Activities Worksheet

**Objective #1**

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**Objective #2**

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**Objective #3**

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**Objective #4**

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**Objective #5**

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### STEP 3: Determine the Features and Benefits

The next step is to outline clearly the benefits someone will get from participating in the AFI Project. All recruitment materials should focus on benefits rather than features.

- Benefits:** Describe what the customers will get out of a product or service. Usually, the benefits of a product or service:
- Solve a customer’s problems
  - Save the customer time or money, or
  - Improve the customer’s health, looks, and feelings about him/herself

*Benefits usually answer the question, “What’s in it for me?”*

- Features:** Describe the characteristics of a product or service: price, style, function, size, and design

#### Examples of Features and Benefits Generated from the Features

| Features            | Benefits  |
|---------------------|---|
| Learn how to budget | Develop skills that will help you control your money (2 benefits) |
| Learn about credit  | Repair or improve your credit (2 benefits)                        |
| 2:1 Match Rate      | Watch your money grow faster than the stock market                |

Use the table on the next page to develop a list of the features and benefits for your AFI Project.

This will help you

- List all of the features of an AFI Project and select those important for promotional materials, such as skills developed, matching money, better credit, more money for goals
- Develop a clear, benefits-focused message for your recruitment materials

## Features and Benefits Worksheet

| Features | Benefits |
|----------|----------|
|          |          |
|          |          |
|          |          |
|          |          |
|          |          |
|          |          |
|          |          |
|          |          |
|          |          |
|          |          |

Your marketing materials will be composed of the most compelling benefits and most relevant features necessary to convey key information about the AFI Project. Now, go back through your list. Circle the features that are critical for your marketing materials. Also circle the benefits that are most compelling.

Finally, different benefits and features will resonate differently with different target markets or segments. Review your features and benefits list again. Using a different color pen or marker for each target market or market segment, circle the three most compelling benefits and the three most relevant features for each target market or market segment.

## STEP 4: Develop the Message

Once you have listed all of the features and benefits of your AFI Project, construct simple, clear messages focusing on the benefits for printed materials—brochures, flyers, posters, mailers, and letters. These messages can also be used for nonprinted promotional tactics, including public service announcements or presentations to community groups.

Using the space below, construct a simple, clear, memorable, and benefits-centered message to promote your AFI Project to each target market or market segment.

### Marketing Message Worksheet

**TARGET MARKET or MARKET SEGMENT #1:** \_\_\_\_\_

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**TARGET MARKET or MARKET SEGMENT #2:** \_\_\_\_\_

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**TARGET MARKET or MARKET SEGMENT #3:** \_\_\_\_\_

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## STEP 5: Determine Best Ways to Promote Your Program

Once you have developed marketing messages for each target market or market segment, it is time to figure out how you will distribute your message. You will need to determine the promotional strategies and tactics that best reach each group. Go back to your “**Target Market Analysis Worksheet**” and review the following to help you choose the most appropriate strategies and tactics for your AFI Project:

- **Where members for each group spend their time**
- **Where and how they get their information**

### Five Strategies of Promotion

*1) Advertising*

*2) Sales Promotion*

*3) Direct Mailing*

*4) Public Relations*

*5) Personal Communications*

1. **ADVERTISING**—marketing communication, which informs and persuades customers through paid media.

#### Tactics

Example: Take out a quarter-page ad in a weekly newspaper promoting the IDA Program.

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2. **PUBLIC RELATIONS SALES PROMOTION**—temporary incentives that enhance the perceived value of the product or service, such as coupons, sales, and novelty items

#### Tactics

Example: Hand out free calculators at Orientation

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3. **DIRECT MARKETING**—the practice of communicating with potential “customers” or participants directly, usually based on a list of contacts with similar characteristics, buying behavior, or other factors. This form of promotion has increased with the advent of database technology, which has enabled marketers and businesses to collect and organize information about customers and target marketing communication to similar groups of customers.

**Tactics**

Example: Send a letter explaining the IDA program to your organization’s mailing list of current service users.

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4. **PUBLIC RELATIONS**—product/service and business/organization information communicated by the news media or another third party, which is generally not paid for by the business. The advantage of public relations over the other promotional tools is that it creates credibility.

**Tactics**

Example: Get a reporter to do an article about asset building and IDAs that also includes information on first Orientation.

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Note: *\*What are some potential newsworthy events in an AFI Project?*

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5. **PERSONAL COMMUNICATIONS**—personal contact on a one-on-one or small group basis. Personal selling is used to establish a personal relationship with the customer or participants or to promote a product or service that is complicated and requires a substantial information exchange.

**Tactics**

Example: Do a presentation for a gathering of Head Start parents.

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The promotional strategies and tactics you ultimately choose depend on

1. Your enrollment goal. *How many people must you reach to achieve your enrollment goal?*
2. Your target market(s) and segment(s).
3. Your marketing message(s).
4. Your budget in time, people, money.

### Promotional Tactics Ideas Worksheet

| Advertising | Sales Promotion | Direct Marketing | Public Relations | Personal Selling |
|-------------|-----------------|------------------|------------------|------------------|
|             |                 |                  |                  |                  |

### And, now, a word about word-of-mouth . . .

Most experienced AFI Projects report that the best way to recruit participants is through word-of-mouth referrals—when an account holder tells a family member or friend about the AFI Project and so on. AFI Projects in the early stages of implementation, however, cannot rely on this promotional tactic (a form of personal selling) as the dominant way to recruit account holders because there are no or only a few account holders to pass on the word. Therefore, all AFI Projects need a promotional plan at least in the beginning to generate interest, inquiries, applications, and asset owners. Once there are more than a few asset owners from your AFI Project, you will be able to rely more on word-of-mouth referrals.

The exception to this general rule about word-of-mouth, however, is when you can CLEARLY identify people who have influence with your target market. If infused with the IDA concept, such individuals can then spread the word for you.

***REMEMBER: Word-of-mouth can generate a positive reputation for your program or a negative one, depending on the experience of the individual spreading the word.***

## **Lessons Learned in AFI Projects**

- *“The way in which a program promotes itself creates immediate and sometimes lasting perceptions of that program, both positive and negative. Word-of-mouth can be more powerful than flyers or mass mailings.”*
- *“To kick start account holder recruitment efforts, coordinate an informational event with staff from local social service providers who are possible referral sources,”* such as Health Department, Board of Education, Head Start, Consumer Credit Counseling Services, etc. Invite the press and encourage coverage of the event in local news outlets to draw the attention of potential account holders.
- *“Use volunteers and alumni IDA account holders to promote the IDA program. This can take some of the workload off current program staff and can increase account holder enthusiasm and faith in the program.”*
- *“To recruit new account holders, ask current account holders to refer their friends to the program or to speak at their church or social group on behalf of the program by describing their experiences.”*
- *“To include refugees or new Americans in your IDA programs, you may approach their community through organizations with which they are familiar.”* These include voluntary agencies that provide resettlement services for new refugees (such as Lutheran, Catholic, and Jewish social service organizations) and mutual assistance associations (MAAs), which are community-based organizations composed of members of specific nationalities or ethnicities.
- *“Local bank partners may help IDA programs identify and recruit potential account holders.”*
- Develop a brochure, flyer, or information letter. Distribute it to community based-organizations, human service or religious institutions, community centers, libraries, food distribution centers, grocery stores and other local businesses, financial institutions, check cashing facilities, and bus stands. *“Focus on places you know your target markets get information.”*
- *“Train staff within your agency and at community-based organizations, human service agencies, or religious institutions that serve the same target audience about the AFI Project.”* This is an extremely effective way to generate referrals. Be sure to leave a

supply of brochures, flyers, and applications. Consider establishing a partnership agreement with those organizations to which you provide training.

- *“Perhaps this is included in ‘word-of-mouth.’ However, we have worked closely with adult high schools<sup>8</sup> in our region, made presentations to them, included their teachers in our list of facilitators for the Learn\$ave Training, etc. These teachers/administrators have been actively promoting the project and have been responsible for recruiting many of our participants, especially at the start of the project.”*
- *“Deliver presentations to service organizations”—Lions Club, Kiwanis, Rotary, Black Newcomers Network, and Minority-Owned Business Associations. Not only will this generate referrals to the AFI Project, but it may also generate volunteer facilitators, financial donations, or other in-kind contributions.*
- *“Send press releases and public service announcements (PSAs) to local media”. If you have a calendar section in your local paper, you may be able to regularly list your training courses.*
- *“Better than sending press releases and PSAs—develop relationships with one key staff person at each publication and other media outlets your target markets use.” Contact them to cover newsworthy\* events with respect to your AFI Project or offer to write Op Ed pieces based on news items that pertain to the program. At the end of the Op Ed piece, discuss the AFI Project and IDAs generally.*
- *“Set up a display at a human service agency or businesses frequented by members of your target market” Be sure to leave brochures, flyers, post cards, bookmarkers, pens, etc. that people can take with them to remind them of the AFI Project.*
- *“We’ve integrated our IDA program into our services, so the IDA program is a follow-up service (typically post–business startup/post-business development training completion). This makes it possible for all staff, when working with a client, to identify whether a client would be a good fit.”*
- *“Develop incentives” for agency staff and other recruitment partners to recruit eligible participants.*
- *“Tap into the networks of community leaders or people of influence with your target market members.” Meet with them to explain the AFI Project and get them excited about it; and ask them to spread the word. Give them brochures, flyers, etc. to distribute as they talk about the project.*

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<sup>8</sup> This example is from Canada. Adult high schools are comparable to vocational/technical system or an adult education system.



## Recruitment Plan Worksheet

Use this worksheet to pull all of the pieces of your promotional plan together in one place. You can also use this to monitor the effectiveness of your recruitment efforts.

|   |  |  |  |
|---|--|--|--|
| <b>Target Market/<br/>Segment(s)</b>            |  |  |  |
| <b>Recruitment<br/>Objectives</b>               |  |  |  |
| <b>Marketing<br/>Message</b>                    |  |  |  |
| <b>Promotional<br/>Strategy and<br/>Tactics</b> |  |  |  |
| <b>Referring<br/>Organizations</b>              |  |  |  |
| <b>Staff Time &amp;<br/>Other Costs</b>         |  |  |  |

## STEP 6: Implement Your Recruitment Plan

Use your recruitment plan as a guide and implement it.

- Who does what?
- What materials need to be developed and produced?
- Who needs to understand the Project goals, requirements and the message?
- How will you handle responses to your message?
- Do you have in place the necessary forms, policies and procedures, and data collection means?
- Does everyone involved understand them?

## STEP 7: Evaluate the Results of Your Recruitment Plan

Many organizations overlook this step. Simple data collection will help you determine which strategies and tactics are most effective. You can eliminate those that are not working and put more resources into those that are working. This step will save you both time and money in the long run.

*What are some simple, no-cost ways you can think of to evaluate the efficacy of your recruitment plan?*

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