

CRA NEW and OLD RETIREE EMAIL RECRUITMENT BEST PRACTICE OCTOBER, 2021

Here is the process which we regard as best practice for recruiting new members to CRA chapters using email. When Chevron provides email addresses for retirees, this process is easier, faster, and cheaper than using snail mail.

Furthermore, because filtering the retiree data and using email is so easy, this process allows recruiting over a much greater geographic area and appealing to past retirees. For instance, chapters which contain a **Chevron work center** can now target retirees from that work center, no matter where they now live or how long ago they retired. (Some retirees are interested in keeping up with the colleagues with whom they worked, even if they now live hundreds of miles away. They are encouraged to join their local chapter, too.)

Here are the essential steps:

1. Use the "Demographics Recruiting Report" to select all the (new and old) retirees that have an email listed. (If no email is listed, you will have to use snail mail.) If the report provided does not include the geographic area you wish to cover, ask the Demographics Committee or CVX Human Resources for a broader report. You can even request "Total US" or "Total Canada". Start this process with the most recent report.
2. Filter the report by whatever criteria you wish (e.g. "work location" or "retirement date") using the appropriate code(s).
3. Filter again to obtain email addresses for retirees whose email addresses are provided. (Keep a separate list of those without email addresses for snail mail contact.)
4. Subtract current chapter members from the list.
5. Subtract chapter members who quit within the last four years. (Members who recently quit are not likely to be interested in re-joining.)
6. Send an email to the remaining list of individuals. Introduce CRA and your chapter, including recent newsletters. You don't need to ask them to join immediately. An example of the initial email is attached.
7. Continue to send them your quarterly Newsletters but omit any retirees who specifically request that you not bother them.
8. When the time comes for dues renewal, send that Newsletter along with a direct request to join and the form. An example of this email is also attached. (For remote retirees, suggest they also join, or continue with, their geographically local chapter to expand their network to some new people who will also have much in common with them!)