

# The STAR Framework Toolkit

Setting

Tone



Action

Roles

## Setting: Tool for Engaging Younger Members

You can use a variety of techniques to create an experience setting that the age 50 to 64 demographic find innovative and appealing.

Use location to define the audience's feeling. Along with selecting the time, determining location often is one of the first planning tasks. When making this important decision, consider:



- **Meeting people where they are.** This means choosing a location in a neighborhood close to or near where people live and work, or one that is central to a cluster of people. As a rule of thumb, most people won't travel more than 30 minutes to attend an event.
- **Piggybacking on a popular spot.** Take advantage of existing popular locations to make your experience more accessible. This could mean planning experiences around local festivals, sporting events, farmer's markets or other community happenings.
- **Making it easy to get there.** Choose venues with easy and (ideally) free parking. Make sure that your space is accessible and has good lighting and signage that clearly marks the event entrances. You don't want a newcomer lost because they couldn't find the right door.
- **Look for local flair.** Find spaces that are unique and special to a community. Choose a place people know and love, or find a hidden gem that reflects the town. This familiarity will help people associate your REA with a location they love.

The space should be designed for the experience. Once the location is selected, design the space for your experience to influence how people interact with each other, and you will shape their impression of your REA. For example, utilize "zones" that you want people to experience:

- **Orientation Zone** - Where attendees are welcomed and can sign-in for the event. Attendees might receive a warm greeting, a nametag, an agenda and/or an information packet about the meeting.
- **Exploration Zone** - Where attendees learn. This could be a display board about the work of your REA. Or, it could pose a question to consider that opens the attendee's mind.
- **Conversation Zone** - Where people connect with each other. A natural conversation zone is the refreshment table. To encourage conversation and mingling, add a few high tables for food and beverages while they chat.
- **Participation Zone** - Where people learn and are expected to pay attention. It's the space where the formal part of a meeting or workshop is held.

We hope these tools inspire you to invest time in carefully examining setting for the experiences you are planning. You will strengthen your event by incorporating these techniques around location and zones into your event.

*Check-out our "Checklists for Setting (1 and 2)" when you start to plan your next event!*

## ✓ Checklist for Setting (1 of 2)

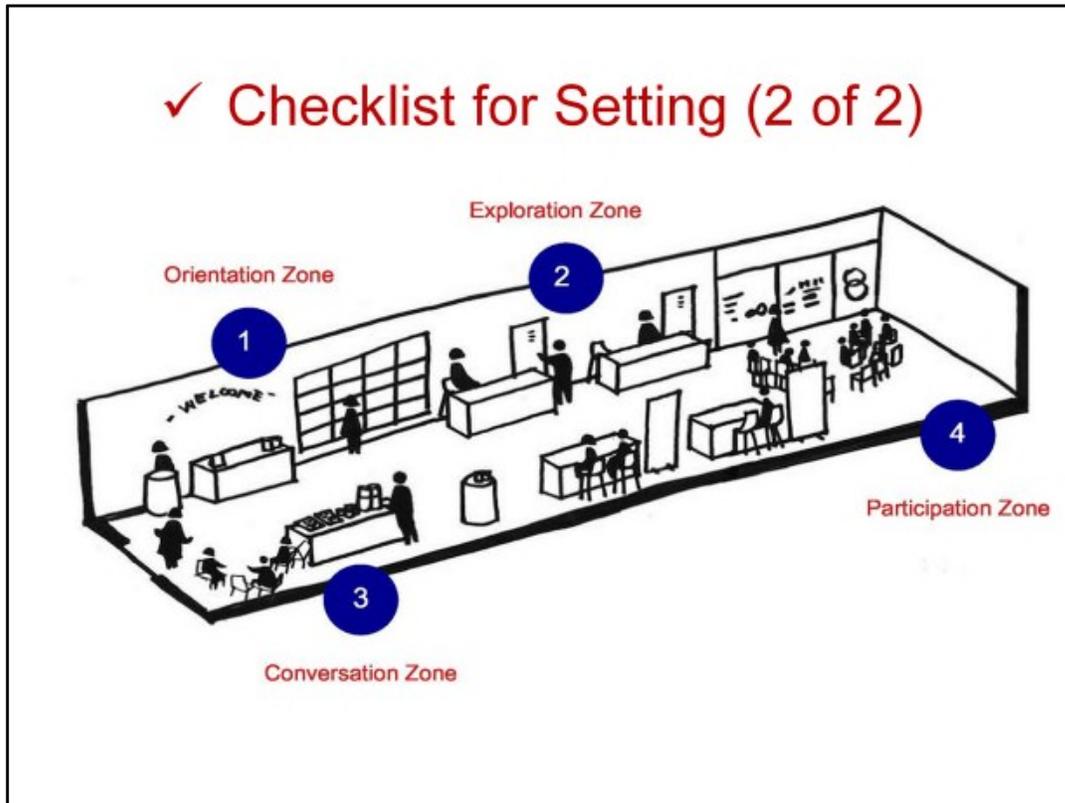


**Setting and location count . . . people care about where they go.**

Check that your location is:

- In the community
- Within a 30-minute drive of your demographic
- A popular spot
- In a place that has good energy and provides the appropriate environment
- Is accessible (easy to find and arrive)
- Has parking (preferably free)
- Has atmosphere (a place with a garden, a chalkboard wall, good lighting, sound system, etc.)
- Has local flair

## ✓ Checklist for Setting (2 of 2)



Your event's layout is important. Zones help by signaling what is going to happen and where.

Check that your setting includes:

### Orientation Zone

- A place to transition from the outside world
- A host who warmly welcomes guests, provides event details and marks attendance
- Information for the event
- Nametags

### Exploration Zone

- A place that encourages people to open their minds, think broadly and network
- Tables, stools and display boards
- A photo board of recent volunteer work or a question posed to spark dialogue or prepare for a conversation

### **Conversation Zone**

- A place to connect with others
- Refreshments including finger foods and beverages
- A connector who invites people to refreshments and introduces people
- Tall cocktail tables to encourage mingling

### **Participation Zone**

- A place to “dig-in”, get hands-on experience or participate in a workshop
- A communal table, workshop benches with stools or seating area with movable chairs
- A presentation wall



## **Tone: Tool for Engaging Younger Members**

Tone is the mood and energy people feel when they walk into a room. We see tone carefully constructed in the retail landscape by stores like Target, Apple, Whole Foods and Trader Joes. Think of how you feel and/or the experience you have when you enter these stores. You can use the same tools to elevate the experience that you are planning.



### **Language, Branding & Visual Style**

- Keep language optimistic. Always choose an optimistic tone in written and verbal communications. Frame situations in a positive light when possible.
- Keep it simple. Choose one font. Leave out clip art that could distract people. A few thoughtful words and one crisp image set tone effectively.
- Use color conservatively or to reflect the mood you want to set. Choose one or two colors and stick with them.
- Reflect a younger image. If you opt to use photos, choose ones that have images of younger people. People aged 50 - 64 will find communication more relevant if they see pictures that look like themselves.
- Lead with substance. Start communications with inspiring content and engaging experiences.

### **Lighting & Décor**

- Sunlight. Use natural light when possible. Sunlight energizes people and creates an upbeat atmosphere.
- Portable up lights. These are lighting fixtures that are placed on the ground that shine toward the ceiling. If you have fluorescent lighting, a few portable up lights will add warmth to your room.

### **Sound & Music**

- Use music strategically. If you have a room that is too big for your group, playing soft background music is a subtle way to make the space feel less empty.

- Be thoughtful about volume. Many people aged 50-plus have some degree of hearing loss that makes it hard to discern conversations in a loud room. Music that is too loud can make it difficult for people to hear.
- Consider culture. For some cultures, in particular, the Hispanic/Latino culture, music is a very important part of a community gathering. Music can be an important element to build inclusivity and make people feel welcome.

### **Dress & Uniform**

- Be approachable. Choose clothing that makes you feel comfortable and confident. When hosting an event, err on the side of less formality so others feel comfortable approaching you.
- Wear a nametag. Nametags break down barriers and encourage networking. The best nametags are ones that also provide a conversation starter like a hobby or interest.

### **Food & Drink**

- Think cocktail party, not cafeteria. In most cases, people are far more likely to appreciate a beautiful platter of hors d'oeuvres rather than a plate of the standard chicken breast.
- If you serve alcohol, make sure there are plenty of non-alcoholic beverages available.
- Use serve ware as a decorative element. If you've chosen colors for your event, use those colors for plates and napkins. Choose clear plastic cups if glass is not available.
- Create a local feel. Food and drinks are a great way to show that you are part of the community. When a newcomer comes into the room and sees a local food or beverage, you help them feel at home.
- Be a good host. Offer a warm welcome and have someone assigned to offer beverages and food.

We hope these tools inspire you to invest time in carefully examining tone as you plan experiences. You will strengthen your event by intentionally creating the right tone for your experience.

## ✓ Checklist for Tone

- Lighting & decor
- Sound & music
- Food & drink
- Language, branding & visual style
- Dress & uniform



**Elevate your experiences with tone.**

Plan to include:

### **Lighting & Decor** – Visual ambiance

- Natural lighting as much as possible; sunlight energizes people
- Candles which provide a warm intimate atmosphere
- Fresh flowers which bring fragrance and make a room more lively

### **Sound & Music** – Works in subtle ways to bring ambiance

- Music can fill a space that otherwise feels too big
- Provides inclusivity and a warm welcome

### **Food & Drink** – A little investment will inspire gratitude and delight

- Finger foods that promote a cocktail party feeling (not a cafeteria)
- A local feel; people appreciate locally brewed beer and local favorite foods

**Language, Branding & Personal Design** – Helps to get your point(s) across

- Optimism
- A younger image in photos and publications
- Lead with the details about what your REA has to offer

**Dress & Uniform** – Your dress and uniform creates a first impression

- Approachable attire – wear clothes you feel great in and that make you look approachable
- If you are the host, don't dress too formal
- Wear a nametag



## Action: Tool for Engaging Younger Members

Action is about the substance of your experience and includes four concepts. These stages are relevant for all-day events like conventions, shorter meetings or even an email invitation. Below are tips and tools which will get you on your way to creating an even stronger, action-oriented REA member experience!



1. **Spark:** This means catching your member's attention and getting them interested in the experience. Ways to create spark include:

- Give people a warm welcome when they come in the door. Ensure someone is there to meet them, take their coat and get them a drink.
- Always ensure a personal greeting, especially in written communications. At the beginning of an email, "Dear Friend" is more welcoming than "Dear Valued Member."
- Pose a thought-provoking question. Ask people to weigh in on a topic that matters in the community. Or, ask people how they heard about the event and why they chose to come.
- Use inspiring imagery to set the tone and context.
- Orient people with a schedule of events or a map. This will help members understand what will occur at the event.

Tools for sparking engagement include:

- **A Registration Table.** People often look for this when they come in, as it helps them orient themselves. Make the table more inviting by swapping a long table for a higher table that puts everyone at eye level.
- **An Agenda.** Put up a large-scale poster of the agenda so that people can get excited about what's to come.

- **A Gallery Wall.** Create a display that asks people relevant questions. For example, at an event about transitions, you might ask, "If you could take up a new hobby tomorrow, what would it be?" and have choices both serious (painting and swing dancing) and silly (tattoo artistry and pet grooming).
- **A Passport.** A card or small pamphlet that details the experiences available at an event and has spots for people to collect stamps from each one.

2. **Connect:** This means linking people to each other and cultivating conversations.

Ways to connect include:

- Make introductions. Find out a few relevant details so you can help attendees connect.
- Use nametags and icebreakers to make it easy for people to connect. Relate these to the topic of the event. For example, at a gardening event, ask people about their favorite season; for a cooking event, ask people about their favorite ice cream flavor.
- Provide designated periods for mingling before and after an event.
- Design events to have small breakout groups where people get to know each other in more intimate settings.
- At seated events, ask people to turn to their neighbor and introduce themselves.
- Use a networking framework. Ask people to share what help they're looking for and what help they can offer others.
- Provide links to online communities and forums.

Tools for connecting people together include:

- **Nametags.** These are essential and even better if they include an icebreaker question. Sheets of nametags can be run through a standard computer printer.
- **Icebreakers.** These can also be simple cards that are left on cocktail tables, on chairs, or by the food and drink to spark conversation. You can even give them to people as they're walking into an event. Taking it a step further, print these on sticker paper and attach them to cups so people's drinks are automatic conversation starters.
- **Online forums and communities.** These digital outlets are a great way to promote discussion and allow people to support each other. For the age 50-64 audience, they are best when used to complement in-person forms of

engagement, rather than as standalone communities. Forums you choose may include tools like Facebook and informal email lists.

3. **Participate:** This means engaging people in an activity. Ways to engage include:

- Think about every event as an activity, rather than a presentation. For example, instead of a presentation on cyber-security, host an event where people learn how to create and maintain secure passwords. Or instead of a presentation on brain health, host brain health trivia night, where people learn how to keep their minds agile by doing just that.
- Use props to make content tangible. This is easy for topics like gardening or cooking that are naturally hands-on, but you can also do this for topics that seem more abstract. For an event on financial security, you might give participants fake money and ask them to allocate it into different piles. Then show them what an optimal allocation looks like. Ask people to do something hands-on prompts people to reflect on their own situation and makes the learning personal.
- Invite organizational partners to create activities for members. This gives partners a better way to highlight their products or services than if they just offered a discount or a presentation, and makes it fun for members, too. Just make sure it's really an activity, and not a sales pitch in disguise.
- Direct people to places in the community to get involved. Provide links to events, programs, or volunteer opportunities hosted by community partners that might interest members.

Tools for inviting participation include:

- **Props.** Whether it's plants and pots at a gardening event or trivia cards at a brain health event, have something tangible for attendees to interact with.
- **Games.** Look for ways to transform content into a game. For example, at a career event you might offer groups of participants a hypothetical career transition and challenge them to come up with the greatest variety of options for that person. Play makes content more memorable for people.
- **Hot-or-Not Paddles.** Break up a traditional presentation by giving participants Hot-or-Not paddles for them to share in real time what they like (Hot) and what they don't like (Not). These tools give people a fun and active role in the discussion.
- **Feedback Boards.** Post feedback visibly on a wall where others can read it

and add their comments. This makes feedback accessible and makes people want to join in.

4. **Extend:** Give people ways to engage again or have more options to participate in the future. Ways to extend include:

- **Offer small steps.** Give people simple actions they can take that will improve their lives. The best small steps have a short-term payoff, helping people see the rewards of their actions and motivating them to make even bigger changes.
- **Provide resources for more future interaction.** People are often overwhelmed by a lot of content in the moment, but happy to read up when they get home. Make resources, including pamphlets, web links, and partner information, available at the end of an event or interaction.
- **Prompt effortless reflection.** Follow up with members after an experience. Give them easy ways (not a long survey) to reflect on their experience and the value they received. A quick comment card or a set of voting jars are great ways to cultivate this feedback, letting people be heard without making it feel like a chore.
- **Share next steps.** For example, after a gardening event, let people know about local community gardens and upcoming planting days. Or as part of a fitness discount, let people know about fitness events going on in the community, such as free morning yoga classes in a local park. Even if the events aren't sponsored by your REA, people will feel grateful and give you credit for the referral.
- **Make it easy to share.** Whether these are digital or tangible, give people ways to share the experience with others in their lives.

Tools for connecting people together include:

- **Takeaway cards.** Give people a small quarter-sheet sized card to take away with them that shares small steps to help them get started. Keep information bite-sized to make it easy for them to take the next step.
- **Local resource lists.** Create a list of local resources around a topic and provide it after events or share it via an Inspiring Update. This may include AARP resources as well as relevant content from partners.
- **Comment cards.** These make it easy for people to give quick feedback. Keep these to no more than 6-8 brief questions. You can also use this as an

opportunity to gauge interest in future participation, and give people opportunities to raise their hand to help co-host or plan a future event or activity.

- **Voting jars.** Take a few mason jars and write some ideas (for future events, etc.) on them. Ask people to "vote" by placing a marble in their favorite jar. Voting jars lower the barrier to giving feedback, while making the process social and fun.

We hope these tools inspire you to invest time in carefully examining "action" as you plan experiences. You will strengthen your event by incorporating them into your experiences.

*Check-out our "Checklist for Action" when you start to plan your next experience!*

## ✓ Checklist for Action

### Creating a flow

A great experience has four stages:

1. Spark
2. Connect
3. Participate
4. Extend

**Inspire people with a great experience.**

Ensure that your experience does the following:

**Spark** – Catches people’s attention and gets them interested in the experience

- Give people a warm welcome with a personal greeting
- Pose a thought provoking question
- Use beautiful, inspiring imagery to set the tone
- Orient people with a schedule of events or a map

**Connect** – Connect people to each other and cultivate conversations

- Make introductions and use nametags and icebreakers
- Provide designated periods for mingling
- Have small break out groups
- Provide links to online communications and forums

**Participate** – Provide people with multiple options to participate

- Consider every event as an activity, not a presentation
- Use props to make content tangible (hot or not signs)
- Refer people to places to get involved – even if it isn't your REA
- Show impact – celebrate successes and make people aware of what you've done

**Extend** – Offer ways to connect

- Offers small immediate action steps where people will see a benefit
- Provide resources to go deeper and share suggested next steps
- Prompt effortless reflection – follow-up after an experience

## Roles: Tools for Engaging Younger Members

**Roles** is arguably the heart of the member experience: it's about us and how we can put our best foot forward to make younger members feel valued. When planning events, it's helpful to have people assigned to these roles from conception to implementation:



- **Host** - The host makes people feel welcome and sets the tone of the experience by greeting people, cultivating dialogue, highlighting next steps and following up. When introducing speakers, a good host will provide context and background.
- **Connector** - A connector is a social butterfly who connects like-minded people to each other. This is done through ice breakers, warm conversation and taking the time to talk to younger members and introduce them to other attendees.
- **Facilitator** - A facilitator leads discussions that make people feel heard and supported by moderating Q&A, includes everyone in conversations, and ensure that presentations are interactive for the audience.

For some events, we might wear multiple hats and handle more than one role. With other events, we might have several leadership volunteers handling one role. Whatever the case, the important thing is to have someone responsible for ensuring each role is covered for an event. To welcome younger members, we need to ensure these roles are standard at events.

We hope this tool inspires you to invest time in carefully examining roles for the experiences you are planning. You will strengthen your event by incorporating these techniques around roles into your experience.

*Check-out our “Checklists for Roles” when you start to plan your next experience.*

## ✓ Checklist for Roles

- Host
- Connector
- Facilitator

**Roles provide us the opportunity to put heart into experiences.**

When organizing events, it is helpful to consider who will complete the following:

**Host** – Make people feel welcome and set the tone for the experience

Responsibilities:

- Greet people and emcee the event
- Welcome people in a personal way and provide context with introductions
- Cultivate dialogue including follow-up
- Highlight next steps – including how people can continue to participate, if they choose

**Connector** – Help people connect with likeminded peers and partners

Responsibilities:

- Talk to members and introduce them to each other
- Use ice breakers to get people talking right away
- Leverage present members and ask them to reach out to new members
- Don't get stuck in one conversation – be a social butterfly

**Facilitator** – Lead discussions that make people feel heard and supported

Responsibilities:

- Lead discussion among members and moderate Question & Answers
- Work with subject matter experts to make presentations more interactive
- Work to include everyone in conversations

## Toolkit on the Spectrum of Younger Members

Younger members, Boomers and Gen-Xers show-up in different ways than our more seasoned members. Here is an introduction to the spectrum of younger members whom you might come into contact with, and suggestions on how to engage each one.



### **The Contented Observer . . .**

Likes to come to events, but doesn't actively participate with your REA. They are content to sit on the sidelines and observe what is going on at your unit events and meetings.

**How to engage:** Welcome this person and introduce yourself. Introduce this person to another member. Feel good about attracting this person to your event. Don't push them to step-up if they seem reticent.



### **The "Niche Participant" . . .**

Will come to your Unit events if they think they will enjoy what your program offers. They are typically passionate about only one interest, and don't readily want to get involved in anything that isn't about their passionate hobby or issue.

**How to engage:** Welcome this person and introduce yourself. Introduce this person to other members who share his or her passionate hobby or issue.



### **The Eager Enthusiast . . .**

Will come to multiple events on a wide variety of topics. Often the first to dive into an activity or raise their hand to ask a question. Maintains strong relationships with other members of the community they live in.

**How to engage:** Look for ways to offer this person something new at every interaction event, such as a new tip, connection, or an introduction to a community partner. Ask for their opinion and make them feel like their voice is heard.



### **The Passionate Advocate . . .**

Is already living the brand. This person deeply believes in your local unit and the work that you do. May already be a volunteer or just submitted their application, and is drawn to the work that we do.

**How to engage:** Talk to them about different ways they could get involved with your REA. Invite them to coffee and find out what they are passionate about. Find moments where they can represent your REA in their local community. Help them find groups of likeminded members whom they can work with in sharing your REA's message.



### **The Community Leader . . .**

Is passionate about community issues. Tends to be a people person with deep roots and connection to the community. May not have a strong affiliation with your REA, but understands the value of your organization for helping retired educators.

**How to engage:** Wants you to invite them to events on issues that they care about. Wants you to gently gauge their interest on in getting involved on their key issue if it is relevant to your REA.

Small changes can make a big difference in recruiting and retaining younger members. Take time with your local units to become familiar with the different types of younger members who might come to your meetings and know that you are prepared to engage and welcome them, no matter who comes in the door.