

Chevron Retiree 2026 Recruitment Results

At the 2026 midyear meeting (MYM) we had an excellent discussion on what we can do to stem the declining membership and be more successful in soliciting new members. We solicited the AVP's and Chapter Presidents for their best recruiting practices to share on the website and at the 2026 AGM. We received excellent feedback that is included below.

The key highlights are as follows:

1. The **Blue Ridge Mountain Chapter** has a robust recruiting practice. Using the **Demographic report**, they download everyone in their CRA code from the **All Retirees and Survivors** tab, eliminating retirees previously contacted. They break up into teams to send a letter inviting these potential recruits to become members and attend their upcoming quarterly meeting. Each team is not only responsible for sending out this initial contact letter, but for follow-through on converting positive responses to membership. They find the potential recruit-to-membership rate to be about 10% of all letters sent per recruiting campaign. More details can be found below.
2. **Music City** starts with the Demographics report and (in this order) they call, email or write those new to the area who are within a reasonable driving distance.
3. **Puget Sound** uses the Demographics report and makes personal phone calls to new retirees who live in the area.
4. Many Chapters mentioned that the **JOIN US** button on the CRA website has been an effective means to add new members. When the retiree gets in touch, it is critical to get back to them ASAP with the information and the sales pitch.
5. Many mentioned that word of mouth is the best way to recruit new members, and they frequently encourage members to reach out to their previous coworkers and encourage membership.
6. One chapter mentioned Health Fair Information booth as a recruiting tool.
7. It is interesting to note that not one Chapter mentioned the National Letter. We spend approximately \$4000 annually mailing these letters to potential retirees to join the CRA. We should review if this is effective use of our funds or if the Demographic Report works just as well at minimal cost.

We have included the detailed emails received from the Chapters so you can read and contact the Chapter if you have any questions.

Steve Hutchison and Kathy Henschel

Co Chairs Membership Committee

Detailed Chapter Recruitment Feedback

Blue Ridge Mountains Chapter Recruiting Practices

From klmdawkins <klmdawkins@aol.com>

Steve, per Deborah's request below, please find Blue Ridge Mountains Chapter Recruiting Practices:

Because the almost 400 members of our chapter are spread across eastern Tennessee, the Piedmont of South Carolina and all of North Carolina - that's over a 10 hour drive from end to end - we have chosen to concentrate on recruiting those retirees that live in a 100 mile radius from the Asheville-Hendersonville area, where we hold our quarterly meetings. We started this focused recruiting effort in earnest in 2024, after we recovered from not meeting for several years due to COVID.

We identify our potential recruiting pool by:

1. We use the MidWest tab of the demographic report, we download from the **All Retirees and Survivors** tab everyone in our CRA code, eliminating retirees previously contacted. Of the resulting eligible recruits, we plot those who live within the 100-mile radius onto a Google map.
2. We then break up into teams by area/zone who send a letter inviting these potential recruits to become a member and attend our upcoming quarterly meeting. Each team is not only responsible for sending out this initial contact letter, but for follow-through on converting positive responses to membership, as well as for tracing, at least once, any non-respondents. We find the potential recruit-to-membership rate to be about 10% of all letters sent.
3. Upon confirmation of interest, we send a Welcome letter by email that provides background on BRMC. We also provide the last few Chapter newsletters as a way to familiarize the recruit with past and upcoming BRMC initiatives and the latest CRA information. Additionally, included in this letter are the names of our 46 current members. We find this piques interest, as on several occasions potential members discovered previous fellow work colleagues were current members, so joined!
4. **Other ways we strive to recruit new members:** we waive the first-year dues and current members spend time at the recruits' first meeting introducing themselves and sharing their work background as a way to promote common ground and solicit areas of interest.
5. We also get self-referrals or current members provide a referral. In these cases, we start with step 3 above. We make sure these new retiree referrals contact CRA, if need be.
6. **We strive to retain members** by occasionally meeting at different venues or member's homes. Khoi has created very interesting newsletters, which help to keep members engaged AND informed. We are also in the process of building a list of initiatives and activities; additionally, we are working with Jim Bonwell to create a webpage. Aside from our recruiting sub-teams, we also have a team that handles sending sympathy cards to families when a spouse or retiree passes, as well as our member that created our Google map helps us maintain it for recruiting. Involving members with such efforts helps build a sense of camaraderie and of feeling valued.

Our expansive coverage area presents a unique challenge. With only 30 retirees and 16 partners, we are mighty but still small. We are exploring other avenues to involve retirees outside our 100 mile radius. An

untapped option to grow our membership is to expand and include retirees from the Charlotte and Raleigh/Triad area, through holding additional local meetings in these areas. However, our small membership affects our capacity, so holding additional meetings in these areas may not be feasible. Maybe, though, an idea we are bouncing around is to recruit area VP's that would manage their own quarterly meeting/membership and report to our President and VP. There's the option of virtual meetings, too, albeit not a very engaging approach. All this to say, we recognize outreach outside the Asheville-Hendersonville area is our best option to increase membership.

Submitted on behalf of David Kent, President, and Khoi Le, Vice President. Please let us know if you have any questions or input.

Kathy Dawkins

Secretary/Treasurer
klmdawkins@aol.com

cell: 925-207-1656

ChevronTexaco Retirees Puget Sound Chapter

From: thurber_j@comcast.net <thurber_j@comcast.net>

Sent: Sunday, February 15, 2026 12:41 PM

To: nwcra3000@gmail.com

Subject: Re: FW: Membership Committee Request

Ray,

I used the information CRA Demographic Report and gave a personal phone call to selective new retirees that lived in the Puget Sound area and folks retired 5-7 years earlier that moved to our area because they most likely would be interested in the social gatherings we had. A few actually did join us. We also had a retiree couple that moved north from California and came to a Christmas luncheon. It's hard work and not a very good return but we've met some very nice people. I know CRA is good about sending us all the information but our area is so large that it's not practical to think people would drive 25 miles or more to join us. If there is no possible social activity for them, they aren't interested.

Jean

Music City Chapter

From John Bulla

Music City - we start with the demographics report and, in this order, call, email or write those new to our area within a reasonable driving distance. We have not had an employment center in over 25 years and have kept our membership stable (50+/-).

FYI – Midwest Area does not have a significant employment center. Between last and this year, three of our five chapters won Steve's Membership Increase Award.

Intermountain Area

From **Martin Knauss**

As an AVP -- I would like to be copied for my area when the notice is sent that a retiree used the request page on the CRA website.

I would like to better understand what communication is done at the initial retirement, and how we can reinforce that. I believe once a retiree is away, the less likely they are to join the CRA. Somehow, we need to automatically enroll them for the first year or some other way of connecting with them.

Thank you

Marty Knauss

Greater New Orleans Chapter

From **GARY E ROEBKE <roebke@bellsouth.net>**

The things that have assisted our membership additions are

1. The CRA website and Adrian's note to the individual chapters that someone has made an inquiry
2. Word of mouth from recent retirees to pending retirees
3. Health Fair information booths

Gary E. Roebke
381 Pencarrow Circle
Madisonville, LA 70447
Cell: 504 251 6547

Southern California

From **Randy Albers**

At the South Bay Chapter we have been receiving some names from the Chevron 20% reduction.

I've gotten names from the refinery letting us know who has left. This gives me their information so I can email or call and talk to them about joining the chapter.

We need to make sure Chevron is still attaching membership forms in to their existing package.

We also have just got on the phone and shake the trees.

Hope this is helpful.

Randy Albers SoCal AVP 310 483-3564

Canadian Prairie Chapter

From Steve Hutchison hutchiss@telusplanet.net

Our membership continues to decline mainly driven by members passing away. We take the following actions in hopes of maintaining our numbers.

Word of mouth is by far the best method to recruit new members. We frequently communicate with existing members to reach out to their former Chevron and Unocal employees to lobby their former co-workers to join the Retirees Association.

The **JOIN US** button on the CRA website has been an effective means to add new members. Once a retiree submits the form, Adrian looks at the zip code then forwards the information to the appropriate chapter. I immediately email the person providing details about the Prairie Chapter including the benefits of joining and details on how to get a membership application. We have had a high success rate but unfortunately, we do not get many of these requests.

Chevron Canada includes a Chevron Retiree Association brochure in the exit package from departing employees. Unfortunately, the brochures get buried in a mound of exit material so rarely do we get members from their brochures.

Steve Hutchison

President Prairie Chapter

Denver Chapter

From cmisaacs1@juno.com

This is Chuck Isaacs in Denver. Our recruiting practices are basically 3-fold:

- 1) I utilize the CRA Demographics quarterly reports to identify retirees that are new to our area - either new retiree or someone who has moved to our area. I then mail them a personal letter and enclose a copy of the CRA brochure. The letter gives them a brief overview of our chapter and invite them to attend our next luncheon to check us out.
- 2) I occasionally receive emails from Adrian D'Souza who forwards names of recent retirees in my area who have been directed to the Chevron Retirees website and then contact Adrian with their interest in CRA. I then email those contacts with information on our chapter, and again invite them to attend our next quarterly luncheon.
- 3) I remind our members that if they know anyone who worked for Chevron or affiliated companies, but did not necessarily retire from Chevron they are eligible to join our chapter. Again, that leads to me contacting them to invite them to attend a luncheon to check us out and hopefully join.

Marin CRA New Member Recruitment Process - 2022

The new member recruitment process I employed as 2022 Marin CRA President is outlined below for future reference.

Desmond King (DesmondFKing@gmail.com)

December 12, 2022

Step 1: Obtained list of Chevron retirees with a Marin address from Marin CRA Board Member responsible for Membership, who sourced these from National CRA.

Step 2: Made a sub-list of all Marin-addressed Chevron retirees who had retired within the last 10 years and who were not members of Marin CRA.

Step 3: Sent a letter on CRA letterhead through US Mail to each person identified in Step 2 inviting them to email me if they were interested in attending a Marin CRA lunch at no cost to them to check out Marin CRA. About 60 letters were sent out. This method ensured that we gathered the email of all interested parties since National CRA did not necessarily have email addresses of retirees (example attached).

Step 4: For each prospective member who emailed me, I sent them a customized sign-up sheet for the next lunch and asked for it to be emailed to me so I could inform the Marin CRA Board Member who was lunch coordinator (example attached).

Step 5: When the prospective member attended the lunch, they had a special “guest” badge so other Marin CRA Board members could easily identify them and make a special effort to welcome them.

Suggested improvement if this process is deployed in the future: Before the luncheon, send a list of the “prospective member guests” to all Marin CRA Board members so they can look for these people at the luncheon and connect with them, especially if they already know the person.

Step 6: Shortly after a prospective member had attended a lunch, I followed up by email thanking them for attending and including a Marin CRA Membership Application Form (example attached).

Step 7: Marin Membership Board Member would report at each Marin CRA board meeting the names of individuals who had signed up as new members recently.

Step 8: I then would reach out via email to prospective members who had attended a lunch, but not joined. I would thank them for attending and generally include the latest Marin CRA Newsletter as a prompt, and suggest they contact me if they wanted to attend the next Marin CRA lunch. I would advertise the upcoming speaker and point them to the newsletter for further details.



Chevron Retirees Association

Desmond King

Marin CRA President

Email: DesmondFKing@gmail.com

Date: April 15, 2022

Invite to a Marin Chevron Retirees Association lunch in 2022 at no cost to you.

Dear

The Marin chapter of the Chevron Retirees Association (CRA) has over 100 members and our mission is to bring former Chevron employees together in a social setting. We meet quarterly in Marin for lunches with informative speakers on a wide range of topics. In addition, there are other activities.

Our February meeting featured an insightful and interesting talk by Andy Walz, President of Chevron America Fuels & Lubricants. On Wednesday May 11 Doug McConnell will address our luncheon at our normal venue of McInnis Park in San Rafael. If you don't recognize the name, you will certainly recognize the face. Doug is a bay area TV personality and author who presented Bay Area Backroads from 1985 to 2008 and the Mac and Muttley TV show in the 1980's. It should be a very entertaining and informative luncheon. On Wednesday August 10 another bay area personality Mike Pechner, long time KCBS weatherman and Bay Area Radio Hall of Famer, will speak to our chapter.

In order for our Marin CRA chapter to remain vibrant we need to continue to recruit new members. New members bring new ideas and new contacts that enable us to keep organizing events that are enjoyable, informative and fulfill our mission of bringing people together and connecting them. Marin CRA meetings are a great way to reconnect with people you may have worked with. Anyone who has worked for Chevron or one of its legacy companies is eligible to become a Marin CRA member. Membership dues are low... currently \$0 for the first year and just \$12 per year after that. You can also join Marin CRA even if you have already joined another chapter of the Chevron Retirees Association.

If you are interested in becoming a Marin CRA member, we would love to see you at one of our upcoming 2022 luncheons. CRA members normally pay about \$35 per person for lunch, but to introduce you to our chapter, we will waive the luncheon cost and you can join us at no cost to you as long as you are Chevron retiree who is a Marin resident.

If you would like to attend an upcoming Marin CRA 2022 lunch at no cost to you to check us out, please drop me an email at DesmondFKing@gmail.com and let me know whether May 11 or August 10 works better for you to be our guest. I can then get back to you with more details about the lunch you would like to attend including the menu options.

I look forward to hearing from you and hopefully seeing you at a Marin CRA event soon.

Desmond King, President Marin Chevron Retirees Association

Marin Chevron Retirees Association
Sign Up for May 11 Luncheon for Prospective Members

Luncheon Date: Wednesday, May 11, 2022

Place: The Club Restaurant at McInnis Park, San Rafael

Time: 11:00 AM No-host bar and fellowship

12:00 PM Luncheon

12:45 PM Program

2:00 PM Adjourn

Our speaker: Doug McConnell, Bay Area Backroads TV host

Luncheon: Lunch will be a choice of (1) Pot Roast with Mashed Potatoes; or (2) Grilled Salmon with Lemon Butter Sauce; or (3) Vegetarian Pasta; all with Raspberry Crisp Ala Mode, coffee, and iced tea.

Please complete the information for the items in blue below and email this reservation request to Desmond King at DesmondFKing@gmail.com by the end of the day on Sunday May 8.

Please type in your name, your email and place an X by your meal preference.

Name of Prospective Member Attending Lunch:

Email address:

Main Course Preference: Pot Roast () Salmon () Veg Pasta ()

Note: All luncheon attendees at check-in at the event will be required to show proof that they've been vaccinated for Covid or had a recent negative test.

Chevron Retirees Association – Marin Chapter

FIRST YEAR Membership Form

Welcome and thank you for your interest in joining the Chevron Retirees Association Marin Chapter. Please fill out this form, attach a check (if applicable) and send it to the address at the bottom. We hope to see you at the next quarterly luncheon! The newsletter comes out quarterly.

Name:

Address:

City, State, ZIP:

Email address:

Date Retired:

Spouse/Partner's Name:

Dribbles & Scribbles: (Tell us a little about you that you'd like to share with everyone else in the Chapter)

2022 Annual Dues:

First Year Member: Newsletter e-mailed – Free

(Note: After your first year free, the membership for email newsletters will be \$12 per year.)

Other options:

- Newsletter mailed first class, please send \$4 to cover some of the copy and mailing costs.
- If you wish to include your spouse/partner as a member, please send \$5 and their email.

Pay for multiple years! You can pay your future membership dues now and still get your first year free. Just multiply the annual dues by the number of years you want to pay for (up to 4 years in addition to the first year free). Please indicate # of years you are paying for here _____

Make your check payable to Chevron Retirees Association, and send this form with your check to:

Chevron Retirees Association
Marin Chapter
PO Box 6477
San Rafael, CA 94903-0467

Shared Practices from Dallas 2025 Annual Meeting AVP and Chapter Presidents Forum
– For posting – 01/22/2026

Randy Albers – Get the Chapter President involved in membership. Take the list of people who paid dues last year, but not yet this year (“LYNYTY”s) and get the President on the phone to invite them to re-up. He has also started calling members whose membership lapsed 3-4 years ago, and asking them why.

Sel Larson – Sort the list by “company worked for” to find former colleagues/shared interests and issue personal lunch invitations. Personally invite and recognize the “most recently retired” person at the lunch.

Randy Albers – Health Fairs are starting up again – can recruit luncheon speakers from among the organizations that show up at the Health Fairs.

Jerry Lohr – has been targeting recruiting members among Unocal retirees, geologists and geophysicists. Calls from the board members a week before events increase the event turnout by 20%.

Fred Presley – General membership luncheons every other month with topics of interest.

Fran Shirey – surviving spouses sometimes don’t want to come by themselves, so the chapter encouraged them to bring family members or friends. Good speakers attract attendees.

Steve Bergtholdt – Try First Year Free memberships – only 2 chapters currently use it. If you have a work center in your area, encourage others to come. Found the Masonic Lodge would serve lunch at \$30/person.

Chuck Isaacs – Denver invites people to “come check us out and then decide whether to become a member” = first year partially free! Found a community club house available to rent, and get lunch catered or take-out for approx. \$25/person. Good turnout even with no particular speakers.

Examples of non-Chevron speakers – AARP, American Red Cross, other national organizations, someone who can talk about their memoirs.

Walt Gill – Can work through local Government Affairs, Corporate Affairs and/or Chevron Advocacy Network reps to get access to elected officials to invite them to come and speak.

George Wolfe – attendance “ebbs and flows” depending on the age group and the focus of the luncheon speaker – e.g. Alzheimer’s, the District Attorney speaking on gangs, the FBI speaking on crimes against seniors.

Brad McCullough – ask non-profits to come and talk about what they do. Or take an outdoor walking tour, say, to the Presidio.

Steve Hutchison – ask the Fire Department to come talk about senior safety.

Jerry Still – Invite a speaker from the FBI.

Doug Hinzie – lunches with speakers AND walks and hikes in nearby nature areas, e.g., an Audubon Society expert for birdwatching, or a geologist.

Permian Basin – they can go to the company cafeteria to gather for lunch; have recruited lunch speakers at Health Fairs; collaborated with employees for “Christmas in Action”

Chevron Humankind – can collaborate with employees on activities, such as the “Walk to End Alzheimer’s”

Mike Elgie – local journalist was invited to talk about hiking in the San Francisco Bay Area.

Gary Roebke – Invited the Lt. Governor of Louisiana to speak. Chevron sponsors a festival in the French Quarter, as well as Habitat for Humanity.

Riley Gros – invited a speaker from an assisted living facility and organized a tour.

Marilyn Bourne – invited an NFL referee, and a Secret Service retiree.

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!)