**District 5710 Action Plan for Rotary Membership Leads**

One of the easiest and most effective things we can do to expand our club’s membership is to follow up on our online membership leads. Each year, more than 30,000 people express an interest in joining a Rotary or Rotaract club through Rotary.org/join. These leads can be found on the Manage Membership Leads page of My Rotary and detailed steps to manage these leads are outlined in ***GROW YOUR CLUB USING MEMBERSHIP LEADS* at** <https://my-cms.rotary.org/en/document/grow-your-club-using-membership-leads>

District 5710 is committed to utilizing the Rotary Membership Leads Program as a tool to grow our membership by following up on all potential membership leads assigned to our District. To ensure that this is done, the following Action Plan has been developed:

**District Responsibilities**

1. The 5710 District Membership Team Chair will assign a Team Member to monitor and manage the Rotary Leads Program for the District.
2. The District 5710 Rotary Membership Leads Team Member will actively manage 100% of the leads assigned to the district.
3. The designated Leads Team Member will take action on all leads within 7-14 days of notification or discovery on Rotary.org. They will review the lead and determine the appropriate club to receive the lead. This may require a phone call or email to the lead to determine best fit if the inquiry received does not provide enough information to determine appropriate club.
4. Once the District Lead Team member assigns the Lead to a club, he/she will email both the prospective Rotarian/Rotaractor and the prospective club president to notify them of the match. (See Appendix A: ***Communication Responses for Clubs to Grow Rotary Through Leads*** for sample emails and phone scripts).
5. District Membership Leads Team Member will run the Membership Leads Report quarterly.

**Club Responsibilities**

1. In preparation for receiving Leads from the District Leads Team Member, all District 5710 Clubs should have a clear plan in place for who will review the Leads for their club. District Membership Leads Team Member will send an email to the Club President and/or Membership Chair.

-“***How to Manage Membership Leads (For Clubs)****” outlines specific steps to manage your leads and should be used to develop your plan. You can find this pdf at* https://clubrunner.blob.core.windows.net/00000050118/en-ca/files/homepage/how-to-manage-membership-leads/how\_to\_manage\_membership\_leads\_clubs\_en.pdf

1. Upon receipt of a prospective member lead, the club’s designee will reach out to the lead within 10 (ten) days via phone call or email to introduce their club and give information about the club.

**-** *Club designee should consider inviting them to attend a meeting or service project to get acquainted with the club and some of the members.*

***-*** *The club has the responsibility to make sure each candidate’s experience with Rotary is a positive one, regardless of whether or not they join the club. Club leadership needs to talk to them honestly about their club’s expectations of new members.*

1. Club designee will report back to the District Leads Team member by email and also update the Manage Membership Leads page on Rotary.org within 10 days of contact.

**-** *Timeliness is very important especially in those instances where an assigned club feels the Lead is not appropriate for their club, i.e., meeting day and time does not work for the prospective Rotarian. The District Leads Team Member can then expeditiously reassign the Lead to another club or contact the Lead to discuss alternative options.*

1. District Leads Team Member will follow up on all Leads assigned from the Membership Leads Page.

**-** *In the event that information is not received back from the club, District Lead Team Member will contact the clubs and determine next steps. Perhaps the prospective lead is wanting to wait on committing to a club, changed their mind about pursuing Rotary, or is simply not responding.*

**-** *District Leads Team Member will update status as appropriate based on information gathered within 10 days of final contact.*

***APPENDIX A – Communication responses for Clubs to Grow Rotary Through Leads***

**Email examples for Clubs**

Below are customized scripts that you can use to communicate with prospective members who have been assigned to your club through the Manage Membership Leads page in My Rotary. *Please feel free to modify the text based on your needs,* and whichever method(s) you use. Update the prospective member’s status in My Rotary.

*It’s important your club has a process for managing membership leads* that have been assigned to you, because it helps us ensure that prospective members receive a response to their inquiry and have a positive experience engaging with Rotary.

**INITIAL OUTREACH**

***VIA EMAIL***

“Dear \_\_\_\_ (name of prospective member) \_\_\_\_\_\_\_\_\_,

Thank you for your interest in Rotary! My name is \_\_\_\_ (your name) \_\_\_\_\_\_\_\_\_\_\_, and I’m a member of the Rotary Club of \_\_\_\_\_\_ (club name) \_\_\_\_\_\_\_\_.

Our club typically meets on \_\_\_\_\_(day/time) \_\_\_\_\_ at \_\_\_\_(location)\_\_\_\_ (If your club’s meetings include multiple meeting formats, please mention that here). We also organize a variety of service projects and social gatherings that allow our members and friends of the club to get to know each other while serving our community. We would love to have you join us!

I’d be happy to connect by phone or video chat to answer any questions you might have about our club or Rotary. What is a good time for you? In the meantime, feel free to visit our club’s website/Facebook page at \_\_\_\_\_ (club website) \_\_\_\_\_\_\_\_\_ or \_\_\_(club Facebook page) \_\_\_\_.

Thanks again for your interest in our club. I look forward to hearing from you. Best regards,

\_\_\_ (your name) \_\_\_”

***\*Next Step:*** Update status in Manage Membership Leads page in My Rotary

***VIA PHONE***

Hi, is \_\_ (name of prospective member) \_\_\_\_\_\_\_ available? This is \_\_\_\_(your name)\_\_\_\_\_\_\_, and I am the \_\_\_(club role)\_\_\_\_\_\_\_ for the Rotary Club of \_\_\_\_(club name)\_\_\_\_\_\_\_\_\_. Is now a good time to chat? (If yes, proceed. If no, schedule another time to talk, or follow up with an email if they prefer).

Thank you so much for your interest in joining our Rotary club! I’d love to talk with you about your interests and background and set up a time for you to visit our club or join one of our socials or service projects. Can you tell me a little about yourself and how you found out about Rotary? (Be sure to listen and respond appropriately).

Our club has been serving the community since \_\_\_\_ (charter date) \_\_\_\_\_\_\_. Some of our key activities for members are\_\_\_\_ (club activity) \_\_\_\_\_\_\_\_\_\_ and \_\_\_ (club activity) \_\_\_\_\_\_\_. As Rotary members, we’re able to give back to our community through service, form new personal and professional connections, and explore leadership and professional development opportunities.

(At end of conversation) Thank you for speaking with me today. I look forward to seeing you at our next \_\_\_(meeting/social/project)\_\_\_ at \_\_\_\_(time, place)\_\_\_\_\_ , on \_\_\_\_(date)\_\_\_\_\_\_. Have a great day!”

***\*Next Step:*** Update status in Manage Membership Leads page in My Rotary

***VIA TEXT MESSAGE***

“Hi \_\_\_\_ (name of prospective member) \_\_\_! My name is \_\_\_\_ (your name) \_\_\_\_\_\_\_, and I’m a member of the \_\_ (club name) \_\_\_. I’ve heard you’re interested in learning more about Rotary.

Our club typically meets on \_\_(day)\_\_\_ at \_\_(location)\_\_\_. Due to the pandemic, we are currently meeting online via \_\_\_ (virtual platform) \_\_\_. (use if applicable)

We have a lot of opportunities for service while building relationships with each other and the community. I would love to connect via phone or video chat sometime soon. Is there a time that works best for you?”

***NOTE:*** Ideally, it would be best to connect with the lead in person, over the phone, or

video chat at this point in all these cases. However, if the lead is unavailable, the club leader can invite them to check out their website and social media or their next event.

***\*Next Step:*** Update status in Manage Membership Leads page in My Rotary

**FINAL OUTREACH VIA EMAIL**

In some cases, the prospective member simply may not respond. *After multiple methods of*

*outreach, please use the below template to close the loop with the lead and update the status in My Rotary.*

“Dear \_\_ (name of prospective member) \_\_\_\_\_,

I hope this message finds you well. Thank you for expressing interest in joining our Rotary club. We regret that we’ve been unable to reach you. We understand sometimes unforeseen circumstances arise, and perhaps you’re not currently able to engage in Rotary. We're going to update our records to reflect that you’re not interested in pursuing membership in Rotary at this time.

However, should things change, you’re always welcome to contact our club at \_\_(club email address)\_\_\_, (club phone number)\_\_\_, or follow us and our service projects and club events at \_\_(social media link )\_\_\_. Please reach out if you have any questions!

Thanks again for your interest in Rotary! \_\_ (your name) \_\_\_

***\*Next Step:*** Update status in Manage Membership Leads page in My Rotary to “candidate no longer interested”