

CONNECTING WITH PROSPECTIVE MEMBERS



When someone is interested in joining Rotary, they can go to rotary.org/join, answer some questions about themselves and what attracted them to Rotary, and then choose a club based on meeting location, day and time, and format. The person's information goes into our prospective member management system and the club is notified via email that they have a membership inquiry. Club leaders can find the information about these prospective members by signing in to My Rotary. ([Learn how.](#)) Then, club leaders can connect with that person to understand their interests and needs and invite them to experience what their club has to offer.

A PROSPECTIVE MEMBER'S PATH TO MEMBERSHIP



HERE'S HOW IT WORKS

- ① A person visits rotary.org/join and answers some questions. They choose a club they want to connect with and submit their responses.
- ② The selected club's leaders (by default, president, secretary, membership chair, and executive secretary/director as reported in [My Rotary](#)) receive an email letting them know that someone is interested in their club.
- ③ Club leaders promptly contact the prospective member to determine whether the club meets the person's needs and interests. The leaders invite the person to a service project, social gathering, or club meeting.
- ④ If a club cannot meet the person's needs and interests, club leaders assign the membership inquiry to their district for reassignment to a different club.
- ⑤ If a club doesn't report an activity with the prospective member in the prospective member management system within 10 days, the membership inquiry is automatically reassigned to the district.
- ⑥ District leaders (by default, governor, assistant governor, membership chair, and Rotaract representative, if applicable) receive an email notification prompting them to assist when clubs haven't contacted a prospective member within 10 days or when the club wasn't a good fit.

TRACK YOUR MEMBERSHIP INQUIRIES

You can act on and track all your membership inquiries by signing in to **My Rotary**, scrolling down to the **Prospective Member Management System** box, and selecting it. Clubs can also add people who contact them in other ways to keep all prospective members in one place.

Find more details in these how-to guides for **clubs** and **districts**.

WHAT'S MY ROLE?

CLUB LEADERS

Club leaders have an important role in managing membership inquiries. They're the first people able to respond to a prospective member when they get the email about a person's interest in the club. To make the process smoother, club leaders should:

- + **Report their club details** in My Rotary to ensure that prospective members know how, when, and where the club meets.
- + Develop a clear plan for who will review and contact prospective members and report activities in the system.
- + Review the system often and contact prospective members quickly to find out more about them.
- + Invite prospective members to a service project, social gathering, or club meeting.
- + Invite them to join the club if it's a good match. If not, assign the inquiry to the district leaders.
- + Report every activity in the prospective member management system.

NOTE

Because we're focused on the experience that members and participants have with Rotary, prospective members get the opportunity to select the club that fits their needs and interests.

NOTE

Some prospective members will come from referrals (people recommended by current members), some will be members who want to transfer to a new club, and some may be former Rotary program participants or former members who want to rejoin. All can help your club grow.

DISTRICT LEADERS

District leaders have an important role in ensuring that prospective members have a positive experience connecting with Rotary. They will manage membership inquiries that clubs didn't act on within 10 days and inquiries that have been assigned to the district by the club.

District leaders should:

- + Encourage clubs to report **their details** in My Rotary to ensure that prospective members know how, when, and where clubs in the district meet.
- + Work with clubs to ensure that they have a process to manage their prospective member inquiries.
- + Develop a clear plan for who among the district leaders will review and contact prospective members and report activities in the system.
- + Contact prospective members quickly to find out more about them.
- + Connect them with the club they expressed interest in or assign them to a new club.
- + Report every activity in the prospective member management system.

MEMBERSHIP INQUIRY NOTIFICATION EMAILS

By default, the following club and district leaders will receive notification emails when they receive a membership inquiry. Clubs and districts can update who receives these notifications in the prospective member management system.

CLUB LEVEL	DISTRICT LEVEL
Club president	District governor
Club secretary	District membership chair
Club membership chair	District Rotaract representative (if applicable)
Club executive secretary/director (if applicable)	Assistant governor

RESOURCES

- Use the how-to guides for **clubs** and **districts** to understand how to manage your membership inquiries.
- Take the **online course** to learn more about the process.
- Use the **prospective member outreach templates for clubs** for tips on contacting prospective members.
- Use **prospective member reports** to track success rates, gain insights into prospective members' progress, and keep up with trends to help you grow membership in your club.
- Questions? Write to membershipdevelopment@rotary.org.

TIP

Your website and social media accounts can influence a prospective member's first impression of your club. Make it a positive one! Be sure your club information is current and that you showcase what makes your club special. Outdated information may frustrate people or give them a negative image of your club or Rotary. Use the logo template and other promotional materials in the Brand Center to help people understand why they want to be part of your club.