

HOW TO MANAGE YOUR CLUB'S MEMBERSHIP INQUIRIES

Every day, people use rotary.org/join to express their interest in joining a Rotary or Rotaract club. These prospective members (formerly called leads) select a club to connect with based on the details that clubs give to Rotary International. When someone selects your club, the club's president, secretary, membership chair, and executive secretary/director are notified by email. They, or any other officers whose roles have been reported to Rotary, can then go to My Rotary to use the prospective member management system to review the information from the candidate and track their progress.

If you have any questions about managing membership inquiries or about this system, write to Rotary's [Membership Experience staff](#).

Use the links below to jump directly to the section you need.

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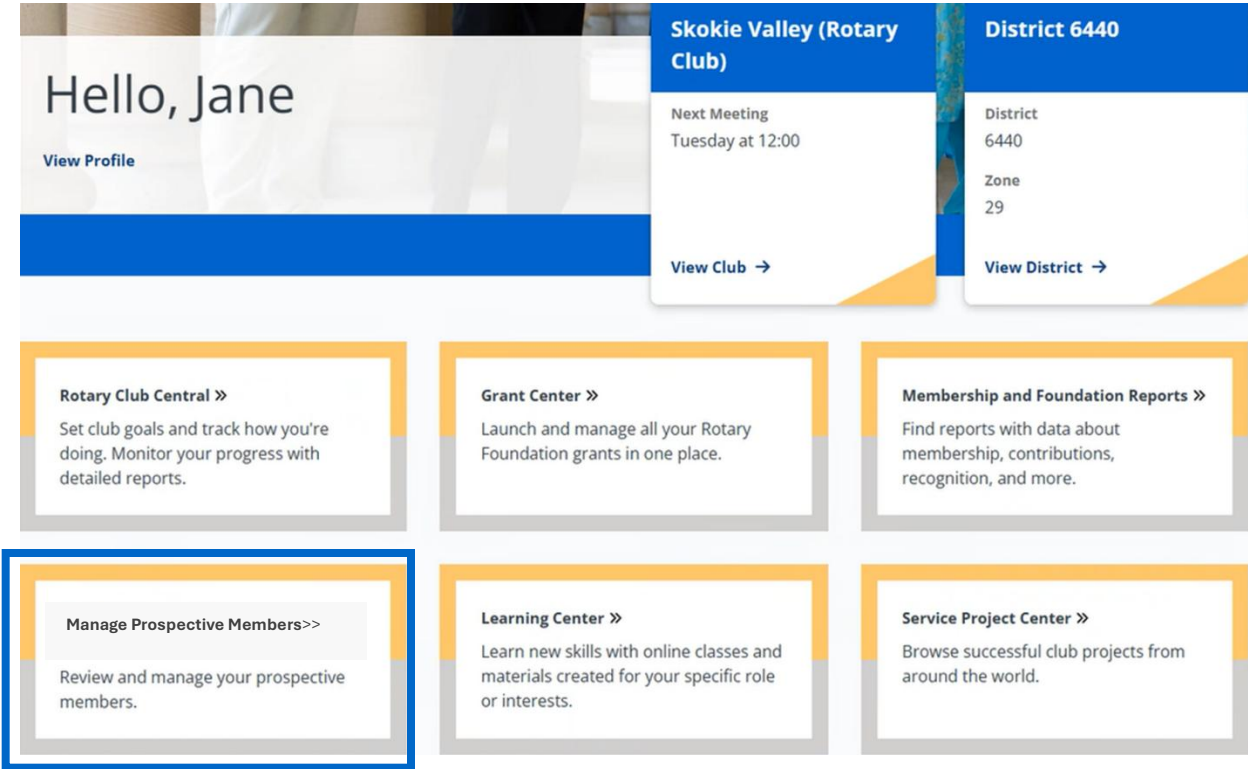
[PLACING A PROSPECTIVE MEMBER ON HOLD](#)

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YOUR CANDIDATE LIST

All club officers whose roles have been reported to Rotary can view membership inquiries in the prospective member management system. Sign in to [My Rotary](#), or choose **Register** to [create an account](#). Then, choose **Manage Prospective Members**.



That will open the prospective member management system, where you'll find your candidate list. If you're using a mobile device, you may need to rotate it to landscape mode to see all the information.


Manage Prospective Members

2

Bensonville - Rotary Club

Add new candidate

New All Active

 **New candidates** 45 Candidates Sorted by Date

Reassign to district Close membership inquiry


Search this list...

<input type="checkbox"/>	Name	Status	Last activity date
<input type="checkbox"/>	Ronald Doe	New	1/20/2026
<input type="checkbox"/>	Baker Duke	New	11/19/2025
<input type="checkbox"/>	Kimberley Pope	New	11/19/2025

4

3

5

 **Pending activities** (7)

Keren Helek
Follow up
Phone call January 14, 2026

Ronald Doe
Attended event
In person January 20, 2026

Ronald Doe
Follow up
In person January 21, 2026

1. Use the main navigation bar to go to your club’s candidate list or its settings, refer a new member, or visit My Rotary.
2. You can also review or edit your club’s settings by selecting your club’s name.
3. Sort your club’s inquiries by name, status, or date of last activity by using the arrow at the top of each column. This applies to the **New** and **All active** tabs.
4. Quickly reassign a candidate to the district or close a membership inquiry by marking the box next to a candidate’s name and then using one of these buttons.
5. Review scheduled activities (initial outreach, follow-up, invited to event, or attended event) in the **Pending activities** section.

RECEIVING EMAIL NOTIFICATIONS

Your club's president, secretary, membership chair, and executive secretary/director will be notified automatically about each new membership inquiry. A link in the email message will take you to the candidate's record. If you're not already signed in to My Rotary, you'll be prompted to sign in or register for an account.

Hello club officers,

Great news! **Rahul Jain** is interested in joining your club.

What to do next:

1. Sign in to My Rotary.
2. Go to the Manage Prospective Members page.
3. Review [Rahul Jain's](#) information and contact them using their preferred method.
4. Report your activity to keep track of their progress.

If you need assistance, this [how-to guide](#) will help you navigate the prospective member management system.

Thank you for your quick attention to this inquiry. Remember, creating a welcoming experience for prospective members is the best way to grow your club and Rotary!

Sincerely,

The Membership Experience team
Rotary International

This is an automated message sent to anyone in your club who is selected to receive prospective member notifications. By default, that is the president, membership chair, secretary, and executive secretary/director as reported in My Rotary. Clubs can edit the notification selections in the prospective member management system.

REVIEWING CANDIDATES' INFORMATION

Select a prospective member's name from the candidate list or follow the link in the email notification to learn more about them. You'll find their contact details, any previous involvement in Rotary, and other information they supplied. If the candidate is a referral, the record will include who referred them and any notes about the referral.

Rotary Candidate list Settings Refer a new member My Rotary English (US)

Manage Prospective Members

Bensonville - Rotary Club

New All Active

New candidates
46 Candidates Sorted by Date

Search this list...

<input type="checkbox"/>	Name	Status	Last activity date
<input type="checkbox"/>	Rahul Jain	New	11/20/2025
<input type="checkbox"/>	Neville Leon	New	11/19/2025
<input type="checkbox"/>	Baker Duke	New	11/19/2025
<input type="checkbox"/>	Kimberley Pope	New	11/19/2025

Pending activities (2) Mark completed

- Keren Helek
Follow up
Phone call
January 14, 2026

View all

CONTACTING THE PROSPECTIVE MEMBER AND REPORTING ACTIVITY

Contact the person using the method they prefer. [This guide](#) can help you lead the conversation. Be sure to document your conversation and what you plan to do next by choosing **Report an activity**.

Rotary Candidate list Settings Refer a new member My Rotary English (US)

Prospective Member
Rahul Jain

Report an activity Admit as member Update status

Details Activity history

Inquiry details

Prospective member name	Type
Rahul Jain	Prospective
Organization name	Rotary ID
Bensonville	
Submission date	Last activity date

Status
New

Pending activities (0) Mark completed

No pending activities

View all

Select the type of activity (initial outreach, follow-up, invited to event, attended event) and method (email, phone call, in person, virtual, text or message), enter the date, and add any notes. This helps you track the candidate’s progress and keeps other club officers informed. Select **Submit** when you’re done.

Settings Refer a new member My Rotary

Report an activity

*indicates a required field

Candidate name
Rahul Jain

Type*

- Initial outreach
- Follow up
- Invited to event
- Attended event

Method*

- Email
- Phone call
- In person
- Virtual
- Text or message

Activity date*

Additional notes*

Cancel **Submit**

Phone number
8088647123

After you report the first activity, the candidate’s status will change to “In progress.” If an activity is scheduled for a future date, it will be listed in the **Pending activities** area.

Rotary Candidate list Settings Refer a new member My Rotary English (US)

Manage Prospective Members

Bensonville - Rotary Club

[Add new candidate](#)

New All Active

New candidates
46 Candidates Sorted by Date

Search this list...

Name	Status	Last activity date
Rahul Jain	New	11/20/2025
Neville Leon	New	11/19/2025
Baker Duke	New	11/19/2025
Kimberley Pope	New	11/19/2025

Pending activities (2) [Mark completed](#)

- Keren Helek
Follow up
Phone call ▲ January 14, 2026

[View all](#)

REVIEWING PENDING ACTIVITIES

You can review prospective members' pending activities and mark them as completed after they occur. Dates in red indicate that an activity date is overdue.

Select the candidate's name to review the details. When it's appropriate, select **Mark this activity as completed** and then **Save**.

The screenshot shows a modal window titled "View an activity" with the following details:

- Candidate name:** Rahul Jain
- Type:** Initial outreach
- Method:** Email
- Activity Date:** January 21, 2026
- Additional notes:** taking off hold
- Created by:** James Ghosh

At the bottom of the modal, there is a checkbox labeled "Mark this activity as completed" which is highlighted with a blue box. Below the checkbox are "Close" and "Save" buttons.

ADMITTING A NEW MEMBER

When you determine that your club can offer the experience the candidate wants and the candidate is ready to join your club, navigate to their record and choose **Admit as member**.

The screenshot shows the candidate record for Rahul Jain. The top navigation bar includes the Rotary logo and links for "Candidate list", "Settings", "Refer a new member", and "My Rotary". The candidate's name "Rahul Jain" is displayed with a "Prospective Member" status. Action buttons include "Report an activity", "Admit as member" (highlighted with a blue box), and "Update status".

The "Details" tab is active, showing the following information:

Inquiry details	
Prospective member name	Type
Rahul Jain	Prospective
Organization name	Rotary ID
Bensonville	
Submission date	Last activity date

The "Status" section shows "New" and "Pending activities (0)" with a "Mark completed" button. A "View all" button is also present.

Then add the necessary details to the **Admit as member** box and select **Submit**. Review the information on the confirmation page, and then select **Close**. Be sure to complete this step in the prospective member management system, even if you also add the person in a club management system.

The screenshot shows a web application window titled "Admit as member" with a close button (X) in the top right corner. The window has a navigation bar with "Settings", "Refer a new member", and "My Rotary" with an external link icon. Below the title bar, there is a note: "*indicates a required field". The form contains the following fields and values:

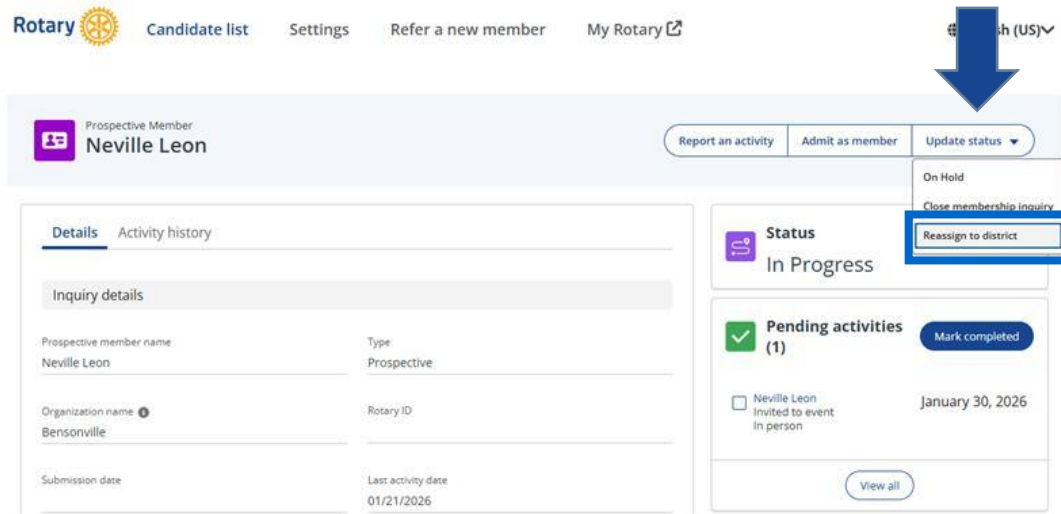
Field	Value
Prospective member name	Rahul Jain
Email	rkjain035ufc@outlook.com
Rotary ID	
Club information	Bensonville
What is your gender?*	Male
Date of birth*	
Country*	United States
Address line 1*	

At the bottom right of the form, there are two buttons: "Cancel" and "Submit". The "Submit" button is highlighted with a blue rectangular box.

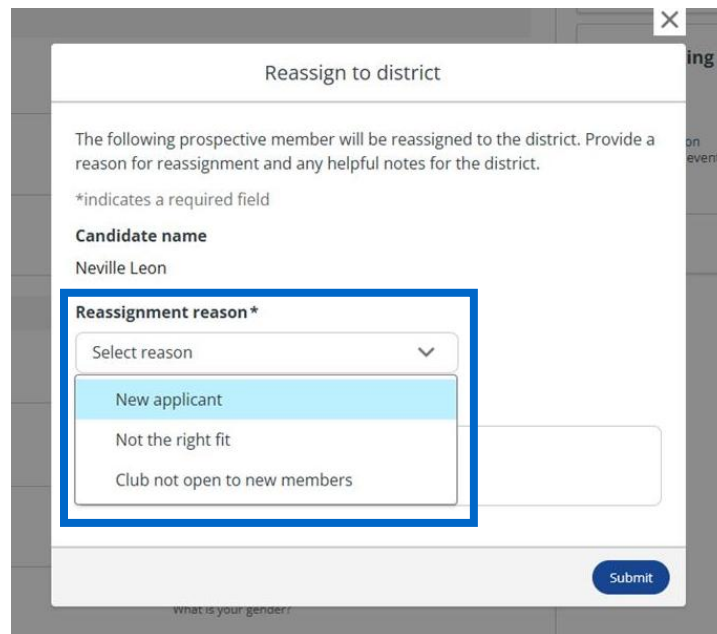
REASSIGNING A CANDIDATE TO THE DISTRICT

If you determine that your club and the candidate's expectations don't align, you can reassign the inquiry to your district. If a club doesn't report an activity within 10 days, the inquiry is automatically reassigned to the district officers.

To reassign an inquiry to your district, navigate to the prospective member's record. Choose **Update status**, then **Reassign to district**.



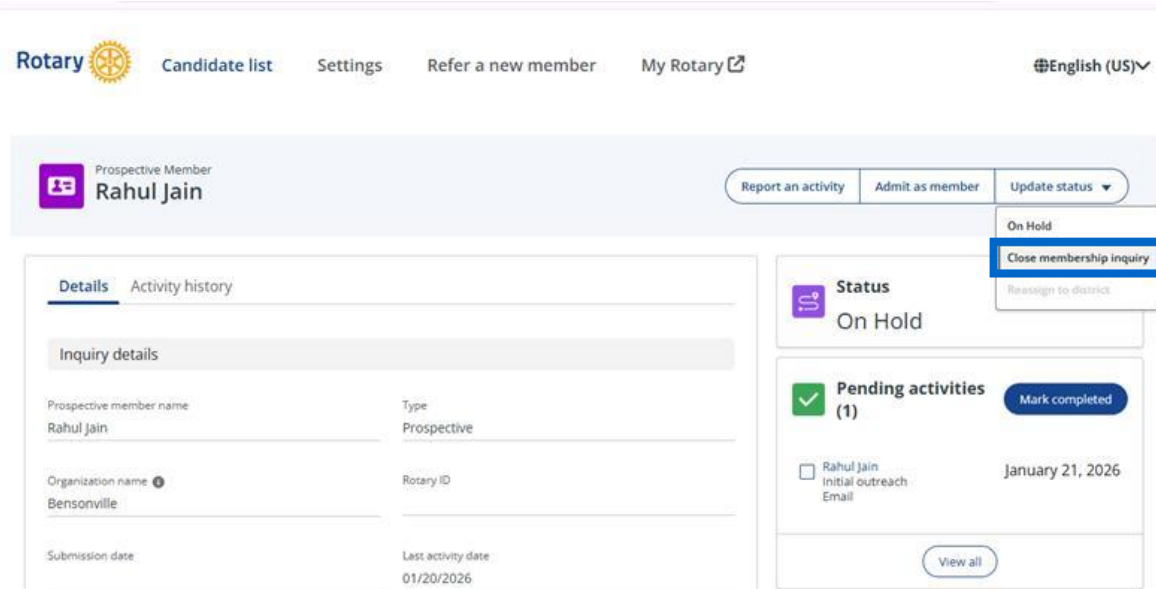
When prompted, select the reason you're reassigning this inquiry. Add notes for the district officers so they can match the person with another club. District officers will also be able to read any earlier notes your club's officers made about this candidate.



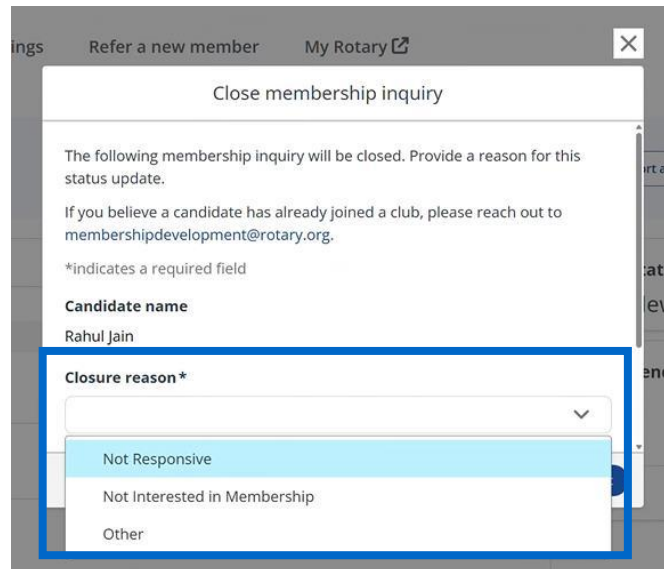
CLOSING A MEMBERSHIP INQUIRY

If you connect with a prospective member and determine that they're not interested in membership at this time, or if your club makes three to five attempts to contact them and they don't respond, you can close the membership inquiry. Closing inquiries helps keep your candidate records manageable.

Use the **Update status** menu to choose **Close membership inquiry**.

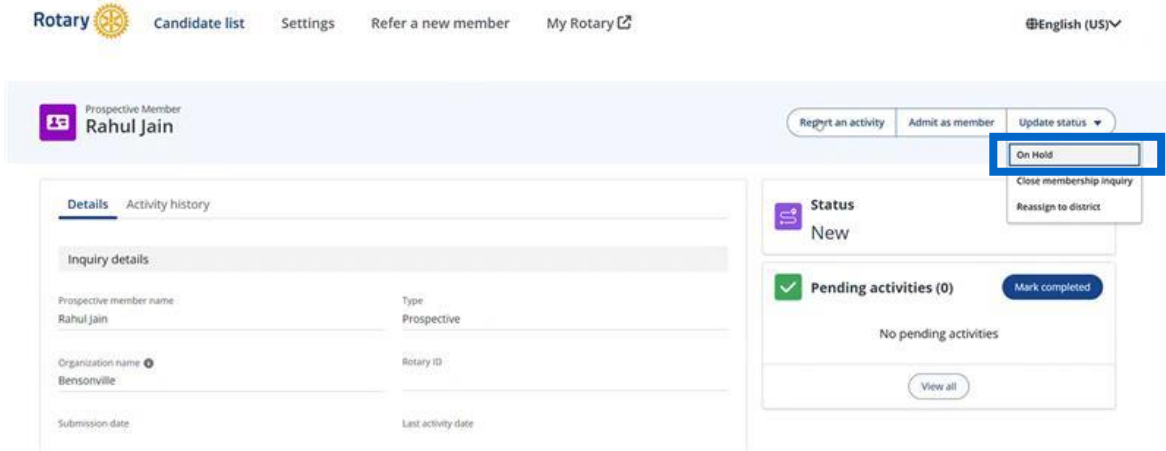


When prompted, select the reason for closing it, add any notes, and select **Submit**. On the next screen, confirm your action by selecting **Close**.



PLACING A PROSPECTIVE MEMBER ON HOLD

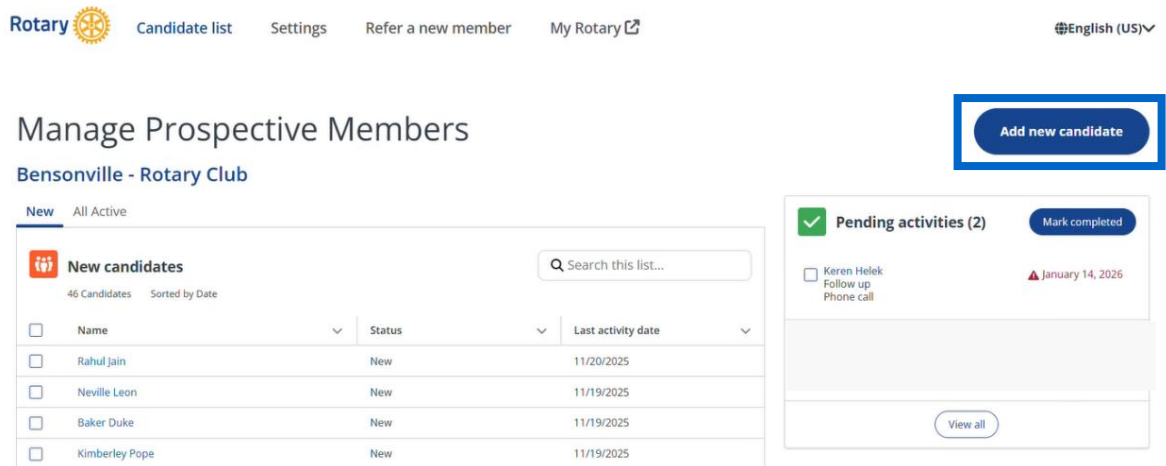
You can place a prospective member’s inquiry on hold if they indicate that they want more time to decide if they want to join. Use the **Update status** menu to choose **On Hold**.



An inquiry that’s on hold won’t be reassigned to district leaders because of inactivity. All club officers who receive prospective member notifications will get a reminder to contact the prospective member who is on hold after 30 days of inactivity.

ADDING A NEW PROSPECTIVE MEMBER

You can also add prospective members to the system yourself so that all your club’s candidate records are in one place. To do this, choose **Add new candidate**.



Complete the form that opens and choose **Submit**.

The form is titled "Add new candidate" and includes a close button (X) in the top right corner. A note states "*indicates a required field". The fields are arranged in two columns:

- First name* (text input)
- Last Name* (text input)
- Email* (text input)
- Preferred language* (dropdown menu)
- Phone country code (dropdown menu)
- Phone (text input with placeholder "XXXXXXXXXX")
- Age range* (dropdown menu)
- Gender* (dropdown menu)
- Additional notes (text area)

At the bottom right, there are "Cancel" and "Submit" buttons. The "Submit" button is highlighted with a blue border.

MANAGING YOUR SETTINGS

You can access your club's settings by either choosing **Settings** in the main navigation bar or clicking on your club's name. There you can adjust email notifications, opt your club in or out of receiving new membership inquiries, or follow a link to update the information about your club that is listed at rotary.org/join.

The screenshot shows the Rotary club management interface. The navigation bar includes the Rotary logo, "Candidate list", "Settings" (highlighted with a blue box), "Refer a new member", and "My Rotary". The main heading is "Manage Prospective Members" for "Bensonville - Rotary Club" (indicated by a blue arrow). Below this, there are tabs for "New" and "All Active".

The "New candidates" section shows a table with 46 candidates, sorted by date. The table has columns for Name, Status, and Last activity date.

Name	Status	Last activity date
Rahul Jain	New	11/20/2025
Neville Leon	New	11/19/2025
Baker Duke	New	11/19/2025
Kimberley Pope	New	11/19/2025

On the right, there is a "Pending activities (2)" section with a "Mark completed" button. One activity is listed: "Keren Helek" with a "Follow up Phone call" and a date of "January 14, 2026". A "View all" button is at the bottom of this section.

Email notifications

Although all current reported club officers can manage membership inquiries, only the president, secretary, membership chair, and executive secretary/director (if you have one) receive email notifications automatically when someone inquires through rotary.org/join. But you can use the settings to change which officers receive the notifications.

In **Settings**, choose **Manage club notifications**.

The screenshot shows the Rotary website's settings page for a club named Bensonville. At the top, there are navigation links: "Rotary", "Candidate list", "Settings", "Refer a new member", and "My Rotary". The language is set to "English (US)". The main heading is "Settings Bensonville". Below this, there are two tabs: "Manage inquiry opt-in settings" and "Manage club notifications", with the latter being highlighted by a blue box. A message states: "If any information below is inaccurate, click here to update." There are two main sections: "Club details" and "Leadership Roles". The "Club details" section includes fields for Club name (Bensonville), Club location (New York, NY United States), Meeting type (Hybrid), Meeting language (English), and Day of week (Monday). The "Leadership Roles" section shows 10 roles and a search bar. To the right, there is a toggle for "Receiving membership inquiries?" which is currently turned on (Yes (opted-in)).

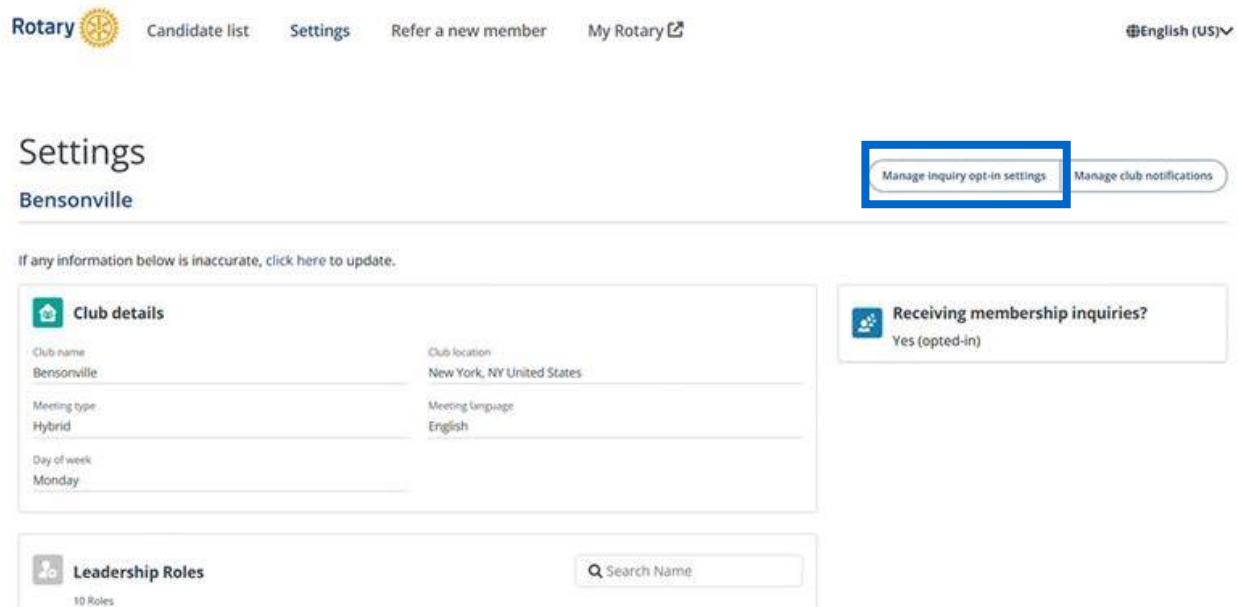
For each officer on the list, you can select **Receive notifications** or **Do not receive notifications**. Remember that at least one club officer needs to receive the emails. Your changes will be saved automatically.

The screenshot shows the "Manage club notifications" page. At the top, there is a "Back to Settings" link. The heading is "Manage club notifications" with a sub-heading: "Choose officers who will receive prospective member notifications. Note that at least one member of your organization must be able to receive notifications." Below this is a table with columns for Name, Role, Email, and Notification opt-in. The "Notification opt-in" column is highlighted with a blue box. The table contains the following data:

Name	Role	Email	Notification opt-in
Jennifer Peterson	Club treasurer	jen@pet.com	<input checked="" type="checkbox"/> Receive notifications
James Ghosh	Club treasurer	jam@gh.com	<input checked="" type="checkbox"/> Receive notifications
peter anderson	Elect Club vice president	peter@and.com	<input type="checkbox"/> Do not receive notifications
peter samsung	Club secretary	peter@samsung.com	<input checked="" type="checkbox"/> Receive notifications
peter decosta	Club secretary	peter@decosta.com	<input type="checkbox"/> Do not receive notifications
peter Watson	Club secretary	peter@wat.com	<input type="checkbox"/> Do not receive notifications
Zaida James	Club Member	zaida.james@invalid.com	<input type="checkbox"/> Do not receive notifications
Kim Garth	Club Member	kim.garth@invalid.com	<input type="checkbox"/> Do not receive notifications

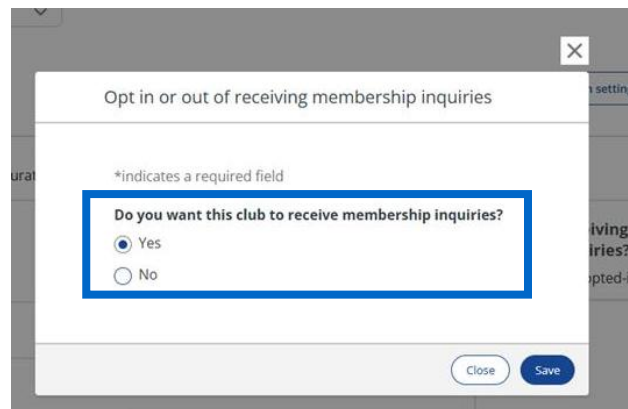
Club opt-in status

Your club can choose whether to receive membership inquiries from rotary.org/join. The default setting is to do so. If you want to change your club's choice, in **Settings**, choose **Manage inquiry opt-in settings**.



The screenshot shows the Rotary website's settings page for a club named Bensonville. At the top, there are navigation links: Rotary, Candidate list, Settings, Refer a new member, and My Rotary. The language is set to English (US). The main heading is 'Settings Bensonville'. A blue box highlights the 'Manage inquiry opt-in settings' button. Below this, there is a section for 'Club details' with fields for Club name (Bensonville), Club location (New York, NY United States), Meeting type (Hybrid), Meeting language (English), and Day of week (Monday). To the right, there is a section for 'Receiving membership inquiries?' with a radio button selected for 'Yes (opted-in)'. Below the club details, there is a 'Leadership Roles' section with a search bar and '10 Roles' listed.

In the box that appears, choose either **Yes** to receive membership inquiries or **No** if you do not want to receive membership inquiries, and then choose **Save**.

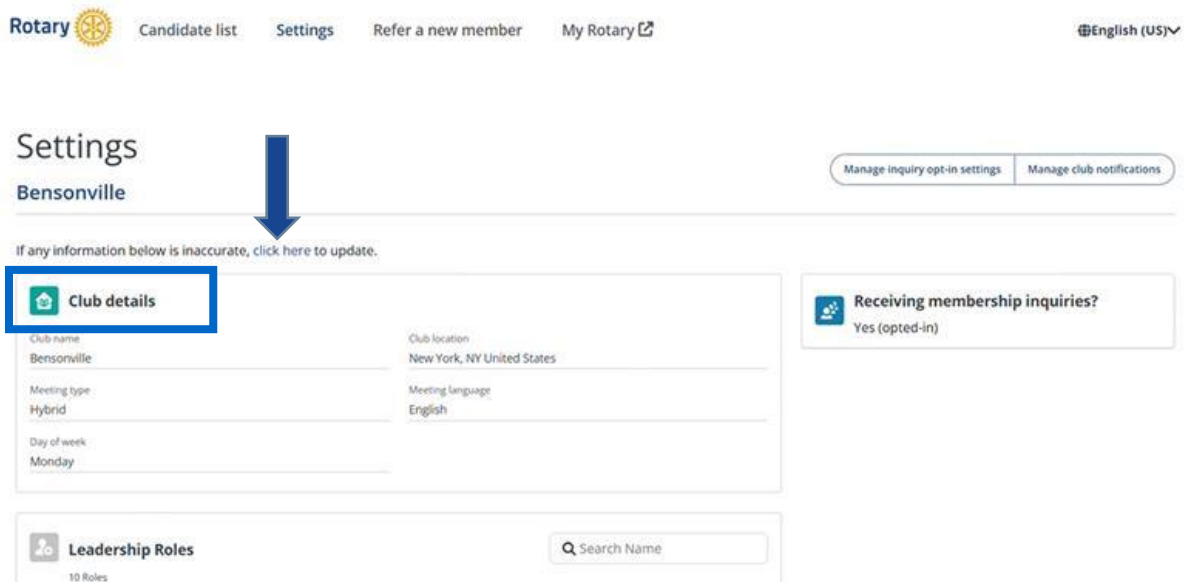


The screenshot shows a modal dialog box titled 'Opt in or out of receiving membership inquiries'. It contains a question: 'Do you want this club to receive membership inquiries?'. Below the question are two radio buttons: 'Yes' (which is selected) and 'No'. At the bottom right of the dialog are 'Close' and 'Save' buttons. A note above the question states '*indicates a required field'.

Remember that this status applies to the entire club. If you want to manage notifications for specific officers, refer to Email notifications in this section of the guide, above.

Club information

Keeping your club information up to date helps prospective members find a club that aligns well with their needs and interests.



The screenshot shows the 'Settings' page for the Bensonville club. At the top, there is a navigation bar with the Rotary logo, 'Candidate list', 'Settings', 'Refer a new member', and 'My Rotary'. A language dropdown menu is set to 'English (US)'. Below the navigation bar, the page title is 'Settings Bensonville'. A blue arrow points to the 'Club details' section, which is highlighted with a blue box. The 'Club details' section contains the following information:

Field	Value
Club name	Bensonville
Club location	New York, NY United States
Meeting type	Hybrid
Meeting language	English
Day of week	Monday

Below the 'Club details' section is the 'Leadership Roles' section, which shows '10 Roles' and a search bar labeled 'Search Name'. To the right of the 'Club details' section is a 'Receiving membership inquiries?' section with a 'Yes (opted-in)' status. At the top right of the settings page, there are two buttons: 'Manage inquiry opt-in settings' and 'Manage club notifications'. A link 'If any information below is inaccurate, click here to update.' is located above the 'Club details' section.

The information in **Club details** is what your club has reported in My Rotary and is what people will find when they look for clubs to connect with. To update the information, select **click here** and you will return to My Rotary. It may take 24 hours for the changes to be reflected.