



PROSPECTIVE MEMBER OUTREACH TEMPLATE (FOR CLUBS)

Starting the conversation can be the hardest part of connecting with prospective members—but it's also an important step in building that relationship. These customizable guides can help start your communications with membership candidates assigned to your club through the [prospective member management system in My Rotary](#). Modify the text to reflect your club experience. To help you keep track of membership candidates and their journey, be sure to report your activity in the system each time you contact them or invite them to an event.

It's important for all clubs to have a process to manage the membership inquiries they receive. Remember that you may be a prospective member's first interaction with anyone involved in Rotary. We want each prospective member to receive a prompt response and have a positive interaction with Rotary.

Initial outreach to prospective member

VIA EMAIL

Dear ____ (**name of prospective member**),

Thank you for your interest in our club! My name is ____ (**your name**), and I'm the ____ (**role**) of the (**Rotary or Rotaract**) Club of ____ (**club name**).

Our club typically meets on ____ (**day and time**) at ____ (**location**) (*If your club has multiple meeting formats, mention that here*). We also organize a variety of service projects and social gatherings that allow our members and friends to get to know each other while serving our community. We would love for you to join us!

I'd be happy to connect by phone or video to answer questions about our club or about Rotary. What are some days and times when we might chat?

In the meantime, please visit our club online at ____ (**link to club website**) or ____ (**link to club social media page**).

Thanks again for your interest in our club. I look forward to talking with you. If we aren't able to connect by ____ (**date**), I'll plan to follow up then.

Sincerely,

____ (**your name**)



What's next:

Report your activity in the [prospective member management system](#) and schedule a follow-up as a reminder. Don't forget to report when the person responds.

Report all activity with a prospective member, from sending an email to receiving a response. Even if you call and they don't answer, documenting this will help you and other club officers keep track of the person's progress. We also recommend scheduling future activities, such as follow-ups or if the person plans to attend a meeting or event. This records your intended interaction and serves as a reminder.

VIA PHONE

Note: This is a sample script to be used as a general guide. Be sure to make it your own, or practice a few times so it sounds natural.

Hello, may I speak with ____ (**name of prospective member**)? My name is ____ (**your name**) and I'm calling because you expressed interest in our (**Rotary or Rotaract**) club. I'm the ____ (**club role**) for that club. Is now a good time to talk? (*If yes, proceed. If no, schedule another time to talk, or follow up with an email if they prefer*).

Thank you for your interest in our club! I'd love to learn about your interests and background, and then schedule a time for you to visit our club or join one of our social events or service activities. Can you tell me about yourself and how you found out about Rotary? (*Listen and respond appropriately.*)

Our club has been serving the community since ____ (**charter year**). Some of our key activities are ____ (**club activity**) and ____ (**club activity**). We also make a difference in our community through service, form personal and professional connections, and benefit from leadership and professional development opportunities. Is there a certain aspect of Rotary that you're most interested in? (*Listen and respond appropriately.*)

(At the end of the conversation) Thank you for speaking with me today. We'd love for you to join us at our next ____ (**meeting, social event, or project activity**) on ____ (**date**) at ____ (**time and place**). Do you think you'll be able to come? (*If yes, proceed. If no, determine the next meeting, social event, or project activity they can attend*). We look forward to seeing you. Have a great day!

What's next:

Report your activity in the [prospective member management system](#). Don't forget to note the future activity if they're able to attend a meeting or other event.

VIA SMS/TEXT MESSAGE

Hi ____ (**name of prospective member**)! My name is ____ (**your name**), and I'm a member of the (**Rotary or Rotaract**) Club of ____ (**club name**). I heard that you're interested in learning more about our club.

We typically meet on ____ (**day and time**) at ____ (**location**).

I would love to connect sometime soon. What are some days and times that we might chat?



Try to schedule a chat in person, by phone, or by video at this point. If the person is unavailable, however, you can follow up by inviting them to visit the club website and social media page or attend an upcoming event.

What's next:

Report your activity in the [prospective member management system](#) and schedule a follow-up as needed.

Final outreach to prospective member

VIA EMAIL

(In some cases, the person simply may not respond. After you've tried to contact them in multiple ways, use this template to end the interaction. Then report your activity in the prospective member management system.)

Dear ____ **(name of prospective member)**,

We appreciate your interest in our club and regret that we haven't been able to connect with you. We understand that people's circumstances change, and you might not be able to engage with Rotary right now. We'll update our records to reflect that you're not interested in becoming a member at this time.

If things change, however, you can always contact our club at ____ **(club email address)** or ____ **(club phone number)**, and you can follow us at ____ **(social media link)** to find out about our service projects and club events. Please let us know if you have any questions!

Sincerely,

____ **(your name)**

What's next:

Report your activity in the [prospective member management system](#) and select "Close membership inquiry."
