



A successful Rotary Membership Recruitment Event (Rotary Information Hour, Discover Rotary, etc.) starts with the right framework. This is a "business seminar", rather than a Rotary meeting, social hour, networking event, etc. Think about how you would organize a new product introduction event for your company's prospects or customers. Besides advance planning (enough lead time for members to get prospects lined up), a successful membership event has several essential ingredients:

Pre-Planning

1. Whether virtual or in person, use online registration to simplify logistics and capture contact information.
2. Ask each member to bring prospects and keep each member accountable. This is not the same as "ask members to bring prospects".
3. Utilize intentional strategies to help members think of prospects
 - a. Invitation Card at each member's place at the next meeting, with instructions to invite someone and report contact info to the Membership Committee.
 - b. "Who Do You Know" exercise at a Club Assembly
 - c. A targeted list of business or community leaders, with someone responsible for contacting each (assigned at Club Assembly)
4. Members report their confirmed prospects **at least a week in advance** of the event to the Membership Committee. That lets you know which members have come through with a committed prospect and which have not and gives time for you to contact those and remind them they need to bring a prospect.
5. **Important:** All Prospects are entered in ClubRunner as "Potential Members" and included in Email distributions of the club's E-Bulletin or E-Newsletter, both before and after the event. Enter the member who invited them in the "Sponsor" field.
6. Membership Committee **emails** prospects with a **reminder** and all event info - time, place, dress code (if necessary), etc. 2-3 days **before** the event.
7. Membership Committee **texts** each prospect a short reminder the **morning of** the event

Event Day

Note: NO bell, NO pledge, NO song, NO invocation, NO "Rotary Meeting" preliminaries - this is a "business seminar" format.

1. The event itself should be practiced in advance and well executed.
2. **Sign-in sheet** at the door -- Name, Email, Mobile Phone and Sponsor (who invited them). Make certain that someone is responsible for not only getting guests to sign in, but also to add walk-ins and contact data you collect to their Potential Member profiles in DACdb after the event. Use name tags and club badges.
3. **Refreshments** – It is a good idea to offer, or have available, refreshments as prospects and members arrive



Holding a Rotary Membership Recruitment Event

4. **Agenda** -- VERY simple agendas work best
 - a. **Introductions** -- Emphasize "30 seconds" each: (intent is 10 minutes, max.)
 - b. Host or MC goes first, setting an example within the 30-second time budget
 - i. Name
 - ii. Vocation (or past, if retired)
 1. For prospects, "What sparked your interest in Rotary?"
 2. For members, "What attracted you to Rotary, and what's kept you coming back?"
5. **Rotary Overview** -- 20 minutes or less, perhaps 2 or 3 presenters to keep it fresh
 - a. Origin of Rotary, Object of Rotary, 4-way Test, Rotary Foundation - highlights only
 - b. Club overview - History, size, meeting day/time
 - c. Avenues of Service & Service Projects (Local and International)
 - d. Membership information. Include overview of financial commitment
 - e. "What happens if I join?" -- Onboarding/orientation process
 - f. Hand out applications -- "Please return to your sponsor (the member who invited you)"
6. **Take Home Collateral** -- Hand out a Rotary Brochure or Club Brochure for each prospect, along with a business card (President, Secretary, Membership Chair, etc.)
7. **Wrap-up**, invitation to stay for refreshments, networking, etc. (20 minutes left to stay inside 1 hour)

Follow-Up

Sponsors are primarily responsible for phone follow-up, same day or next day, inviting them to join and ask, "what's your decision-making timetable?", and reporting same to Membership Committee

1. Follow-Up Email, thanking prospects for attending - same day or next day
2. Phone call from President or Membership chair within 2 days, asking if any questions and inviting them to join
3. Sponsor continues to follow up until we get a "Yes", "Not Now" or "No".
 - a. **Yes** -- proceed with Membership Proposal process
 - b. **Not Now** -- Keep as Potential Member and in "drip marketing", send agenda's invite to service projects, include in distribution of newsletters etc. Revisit at least every 6 months.
 - c. **No** -- Terminate from mailing list and drop them out of your prospect list.

Repeat

This is an event you should run on a regular basis at least every 6 months.