

FINDING PEOPLE TO INVITE: A PROSPECTIVE MEMBER EXERCISE



You can find new members by asking people you know, following up on your club's online membership leads, identifying who's missing from your club, cultivating new relationships, and leveraging social media.

Encourage members to invite prospective members to service activities, club meetings, and events so that they can learn how your club works with the community and provides opportunities for friendship and connection. Each club should review its list of membership leads regularly and contact those people. And keep making progress on making your club better reflect your community.

To reach an even broader group of people, work with your public image committee to promote your club's service and social activities on social media. Tagging contacts who may be interested in an event, adding a "join" link on public documents or webpages, and using hashtags strategically are all ways to broaden your reach.

WHAT YOU'LL GAIN

Identifying prospective members and actively engaging them will help your club:

- Develop a group of potential candidates for membership
- Determine how to introduce prospective members to your club
- Get to know people and what they're looking for so you can meet those needs



Clubs around the world approach member recruitment in very different ways. Customize this exercise to make it appropriate and relevant for your region.

GETTING ORGANIZED

Set aside time for members to complete the Identifying Prospective Members Worksheet at a club meeting. This exercise generally works best at the beginning of a Rotary year, when annual membership goals have just been set, or in March, when the incoming president is planning for the next year.

GETTING STARTED

Step 1: Ask all members to complete the Identifying Prospective Members Worksheet.

Explain the purpose of this exercise and ask club members to fill out the worksheet. Compile the information they provide, along with your club's membership lead candidates, and maintain a list of prospective members.

Step 2: Make an action plan.

Invite the prospective members to a club meeting, service activity, or social event. If you conducted the diversity assessment, refer to the list of groups you found to be underrepresented in your club and include people from those groups as well. Now you can develop a plan that specifies:

- Who you want to invite, and if you want to do so in small groups
- Who is responsible for inviting each person
- What event they'll be invited to
- How the person responsible will make the invitation
- How they'll follow up with the prospective member after the event

Step 3: Invite prospective members to a club event.

Invite the people from your list to attend an upcoming service activity or meeting. Or host a special event where they can meet club members and learn about the club in a casual atmosphere. Make them feel welcome by having the club president or another leader greet them personally.



You can use the Manage Membership Leads page of My Rotary to [store information](#) about all your prospective members.



Two of every three prospective members who are referred by a current member join Rotary. If a prospect is interested but can't join your club, you can still help Rotary grow by referring them to another club.

Step 4: Follow up with prospective members.

- Ask members who invited guests to contact them and then share their interest or feedback with the club.
- Keep the worksheets and your compiled list for future membership efforts.
- Regularly use the Club Administration area of My Rotary to track membership leads gathered through Rotary's website.
- If you find people who are interested in Rotary and would be good members, but they aren't a good fit for your club, refer them to another club.

Want to do other assessments?

[Member Interest Survey](#)

[Diversity Assessment](#)

[Retention Assessment and Analysis](#)

[Member Satisfaction Survey](#)

[Exit Survey](#)

Use the Club Action Plan in appendix 1 to track your membership efforts.



You can also review the [Rotary Research page](#) for a broader understanding of membership trends.

IDENTIFYING PROSPECTIVE MEMBERS WORKSHEET

Think of your contacts, acquaintances, friends, and family members, as well as community residents who might be interested in your club. You don't have to know if they're ready to join Rotary.

After you've listed the names of people who might be interested, circle anyone you think would be a good fit for your club in particular.

Your name: _____ Date: _____

Professional contacts

Consider your current and former supervisors and colleagues, acquaintances from professional associations, and people you have done business with recently.

Name: _____ Occupation or area of expertise: _____ Gender: _____ Age: _____

Name: _____ Occupation or area of expertise: _____ Gender: _____ Age: _____

Service contacts

Consider neighbors, community leaders, and acquaintances who have volunteered with you on Rotary or non-Rotary events or projects.

Name: _____ Occupation or area of expertise: _____ Gender: _____ Age: _____

Name: _____ Occupation or area of expertise: _____ Gender: _____ Age: _____

Community contacts

Consider other people you know in your community, such as:

- Accountants
- Business consultants
- Civic leaders
- Construction workers
- Dentists
- Entrepreneurs
- Financial managers or planners
- First responders
- Food or beverage industry workers
- Health care workers
- Information technology professionals
- Lawyers
- Local innovators
- Nonprofit professionals
- Nurses or doctors
- Psychologists
- Public relations professionals
- Real estate agents
- Religious leaders
- Sales executives
- School administrators
- Social workers
- Stay-at-home parents
- Teachers or professors
- Veterinarians

Name: _____ Occupation or area of expertise: _____ Gender: _____ Age: _____

Name: _____ Occupation or area of expertise: _____ Gender: _____ Age: _____

Name: _____ Occupation or area of expertise: _____ Gender: _____ Age: _____

Name: _____ Occupation or area of expertise: _____ Gender: _____ Age: _____

Rotary contacts

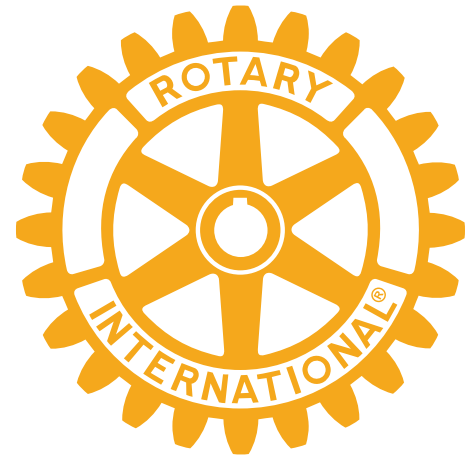
Consider past members or Rotary alumni that you know or that your club maintains contact with. Rotary alumni are people who have participated in:

- Ambassadorial Scholarships
- Interact
- Grants for University Teachers
- Group Study Exchange
- New Generations Service Exchange
- Rotaract (which is now a membership type)
- Rotary Peace Fellowships
- Rotary Scholarships
- Rotary Volunteers
- Rotary Youth Exchange
- Rotary Youth Leadership Awards (RYLA)
- Vocational training teams

Name: _____ Occupation or area of expertise: _____ Gender: _____ Age: _____

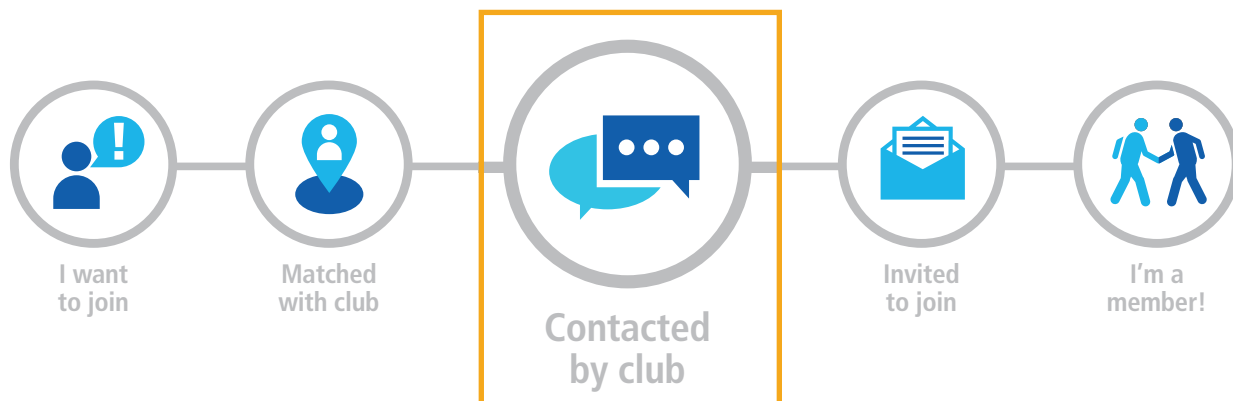
Name: _____ Occupation or area of expertise: _____ Gender: _____ Age: _____

CREATING A POSITIVE EXPERIENCE FOR PROSPECTIVE MEMBERS



When your club is vibrant, innovative, and making a difference in your community, it will attract prospective members. Bringing in new, qualified members diversifies your club and increases its impact. Because this may be the first contact a prospective member has with a club, be sure to make it a positive one.

A PROSPECTIVE MEMBER'S PATH TO MEMBERSHIP



YOUR PROSPECTIVE MEMBERS

Prospective members can include any of the following:

- A qualified person proposed by one of your club's members (see **Proposing New Members**)
- Someone who approached your club (perhaps having found it through **Club Finder**)
- Someone identified by your club (see **Finding New Members: A Prospective Member Exercise**)
- A candidate who expressed interest through Rotary.org's **Join** page*
- A former Rotarian who is interested in rejoining*
- A current Rotarian who wants to change clubs*
- A qualified person referred by a Rotarian from another club*

*You'll learn about some prospective members through online membership leads. You can track these leads by updating their status on the **Manage Membership Leads** page.

However you learn about prospective members, it's important to take the time to meet with them so you can get to know them and determine whether they are a good fit for your club. Meeting with them also allows you to introduce them to your club so they can decide whether it offers what they are looking for.

Because people can become members of a Rotary club only if invited, the process of admitting new members involves thoughtful planning and deliberation, but also timely response and tact. Whether or not prospects become members of your club, their experience of Rotary should be positive. You can offer a positive experience to all prospective members by following the tips in this guide.

MEET WITH PROSPECTIVE MEMBERS

Has your club established a process for following up with prospective members? Designate a member to connect with prospective members to talk about their interests and your club. During this conversation:

- Get to know the prospective members. Explain what Rotary is to you and the benefits of membership, such as the opportunity to make a difference in the lives of others, develop skills that can be useful in your career, and form lasting friendships.
- Tell the prospective members about your club, what to expect at meetings, and the service projects the club has planned. With their interests in mind, explain how your club can help them pursue their passions.
- Be candid about your club's financial obligations and participation expectations or requirements.
- Be sure to keep this meeting friendly and somewhat brief, so you don't overwhelm prospective members. You can give them a **prospective member brochure** from Rotary International and a **club brochure** that includes details about your club's meetings and activities.

Find more resources for prospective members at www.rotary.org/membership.

Some clubs have larger-scale information sessions that are open to members of the community. For these sessions, or any event, consider showing a Rotary video and giving a presentation about discovering Rotary. The session should still cover what Rotary offers and the benefits of joining your club, but getting to know the prospective members may require one-on-one follow-up.

If you learned about the prospective member through an online membership lead, you can admit them directly using their Rotary ID number on the **Manage Membership Leads** page.



DETERMINE FIT

After your meeting, discuss what you learned about the prospective member with your club membership committee and board to determine whether the prospect is a good fit for the club. Keep an open mind about the person's qualifications, and remember that diversity is one of Rotary's core values. Members who have different perspectives and backgrounds bring fresh ideas and new approaches.

Offering prospective members a positive experience engages them from the start and leaves them with a good impression of your club and Rotary. Having a protocol for engaging prospective members — whether or not they become members — helps create that experience.

ENGAGE

Track online membership leads at this stage by selecting one of the following options in your **Manage Membership Leads** page:

- Club reviewed inquiry
- Club contacted candidate
- Club assigned candidate to a club officer
- Candidate attended meetings

A GOOD FIT

If the prospective members are found to be a good fit and you want to move forward:

- Invite them to attend a meeting or two as guests. Consider covering the meal charges, if applicable, as a courtesy.
- Invite them to a social or service event.
- Introduce them to other members of your club.
- Answer any questions they may have.
- Extend an invitation to join your club, if appropriate.
- Add the new members to your club membership list.
See **How to Add a Member**.
- Celebrate their new membership with the whole club.
- Assign mentors to engage new members right away.
- Provide a series of in-depth new member orientation sessions.
See **Introducing New Members to Rotary: An Orientation Guide**.

ADMIT

Track online membership leads at this stage by selecting one of the following options in your **Manage Membership Leads** page:

- Club proposed candidate for membership
- Club admitted candidate

NOT A GOOD FIT

If your club determines that a prospect is not a good fit, with luck, he or she will realize that, too. You may feel that the prospect is not ready to join. Explain the qualifications your club expects of members and offer the prospect ideas for acquiring the needed skills or experience. Whatever the reason may be, having a personal conversation to let the person know is the courteous thing to do.

There are a number of reasons membership doesn't work out. You can maintain relationships with candidates who aren't yet ready to join by inviting them to participate in service projects and social events so they can continue to support your club in the community.

And you can suggest alternatives:

- **Refer them** to another club that may be a better fit if the problem is your club's meeting time or place or financial obligations, or if they are interested in other types of activities and projects. Every club is unique — some even meet exclusively online — so consider this possibility.
- Consider starting a satellite club if you have a group of prospects, or current members, whose needs or wants differ from the rest of your club's.
- If the prospective member is under the age of 30 and not ready to join a Rotary club, refer them to a Rotaract club.

For online membership leads, be sure to update the status of the lead to reflect what the result was. The gold boxes above list the status options available. When you update a lead's status, you automatically inform your district and RI of what's happening with the leads they forwarded to your club, and you also immediately update your club's membership reports.

DISMISS

Track online membership leads at this stage by selecting one of the following options in your **Manage Membership Leads** page:

- Candidate sent back to district for reassignment
- Club determined candidate was not interested in Rotary
- Club assigned candidate to a youth program
- Club rejected the inquiry

For more information about online membership leads, see **Connect to Membership Leads** and **How to Manage Membership Leads: for Clubs**.

DIVERSIFYING YOUR CLUB: A READINESS ASSESSMENT

Clubs vary widely in their readiness to build connections with new people and create a culture of inclusion. Complete the table below, using the empty row to add your own ideas. Discuss the steps you would take as a group.

IS YOUR CLUB READY TO ...	YES/NO (circle one)	NEXT STEPS
Discuss the benefits of having its membership accurately represent your community?	Yes No	
Dedicate time during a few meetings to conduct the Diversifying Your Club assessment and complete the Member Diversity Worksheet?	Yes No	
Consider several perspectives when applying The Four-Way Test?	Yes No	
Recognize the difference between equality and equity, and understand why equity is our goal?	Yes No	
Understand and counteract the ways in which unconscious biases can shape how we perceive people?	Yes No	
Build authentic relationships with diverse groups of people?	Yes No	
Include members of underrepresented groups in any discussion of community needs and give them an active role in any initiative?	Yes No	
Develop a culture of inclusion where everyone who engages with us feels respected and valued for their unique qualities?	Yes No	