



Connecting with Membership Leads

District Membership Chairs Education Session

Zones 25B & 29 Institute – Houston, Texas
September 9, 2021

Stacy Brevard, District Membership Chair 5890
Dian Edwards, Rotary Coordinator



YOUR SESSION FACILITATORS



STACY BREVARD

DISTRICT MEMBERSHIP CHAIR, D5890



DIAN EDWARDS

ROTARY COORDINATOR



CONNECTING WITH MEMBERSHIP LEADS

MEMBERSHIP LEADS



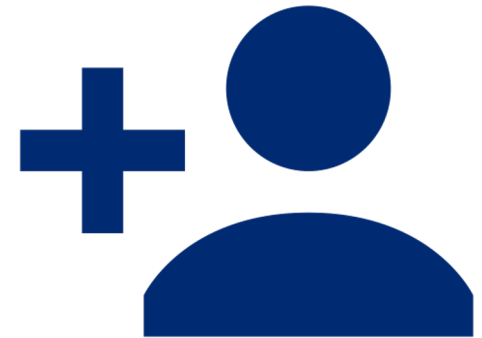
Prospective
Members




Relocating/
Rejoining
Members



Member
Referrals



Club-Added
Candidates

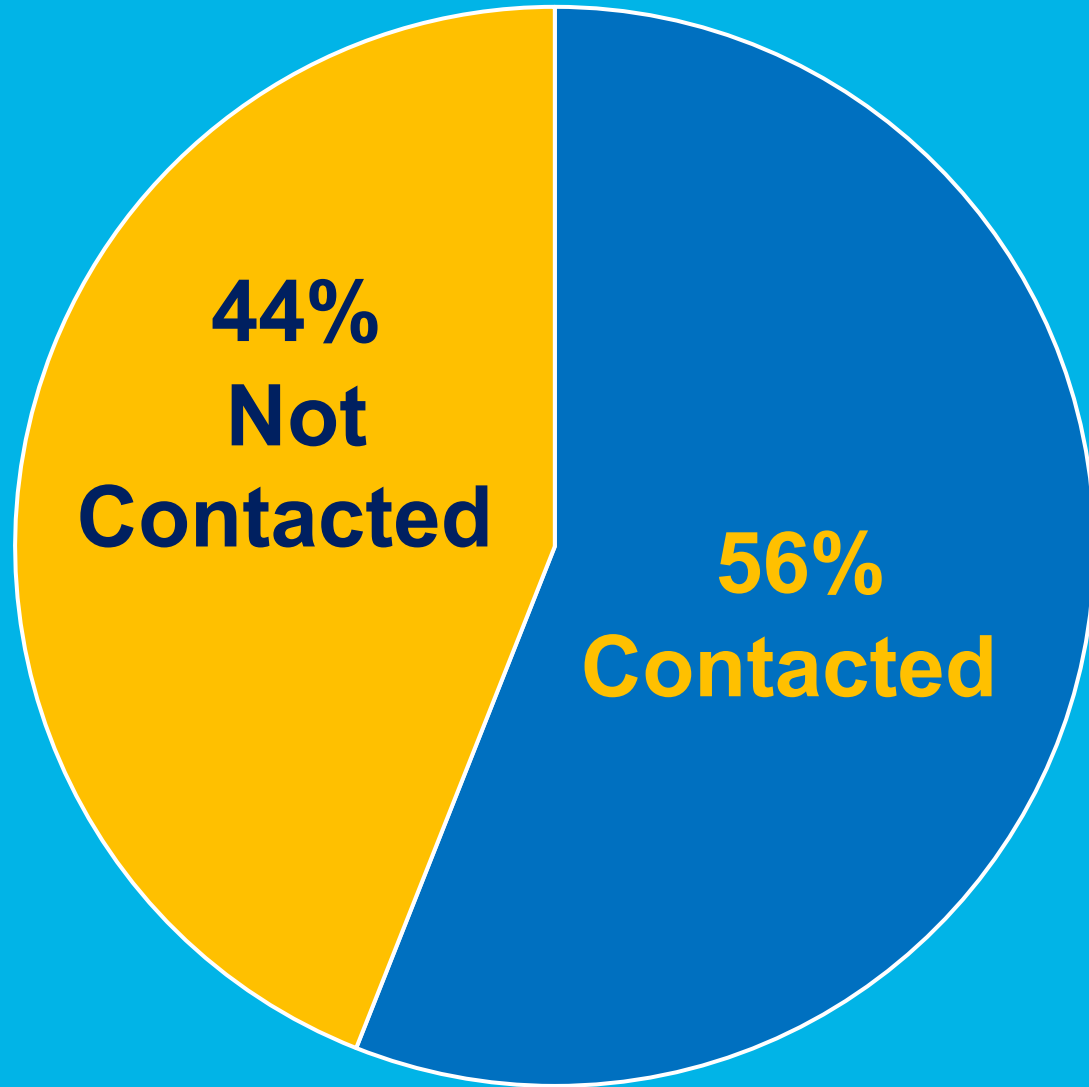
A world map is overlaid on a light-colored wood grain background. The map is dark brown and shows the outlines of the continents. Numerous small blue dots are scattered across the map, primarily concentrated in North America, Europe, and Asia, representing various Rotary clubs or districts.

Membership leads can help you increase membership in your club or district. It's one way Rotary connects clubs with people who want to create positive change.

EXPAND OUR REACH

Rotary's Action Plan: Priority 2

- Grow Rotary membership to 1.3 million by:
 - **Increasing and diversifying participant base by starting new and innovative clubs and participant engagement channels.**
-



Contact Rates

2020-2021

Annual Report

44% Not Contacted

Club & District Administration >

Community Marketplace >

Brand Center >

Products & Services >

Travel & Expenses

Club Administration

District Administration

Contributions

Reports

Rotary Club Central

Club & Member Data



Update Member Data

Report membership changes within 30 days, no later than 1 January or 1 July, to ensure your club invoice reflects the latest information. Record new member sponsors.

[Add, edit, or remove members](#) | [Add, edit, remove club officers](#) | [Record a new member sponsor](#)



Update Club Data

Provide club contact information and choose club management providers.

[Update meeting details](#) | [Update mailing address and contact information](#) | [Designate a club management vendor](#)



Manage Membership Leads

Review your online membership leads for prospective, referred, and relocating or returning members. Then assign and track your candidates through the membership process – from inquiry to induction.

[View or manage leads](#) | [About the membership leads program](#)



Manage Membership Leads

Candidates for District 5890

CANDIDATES

+ Add Lead

Filter



Prospect type

Any

Status

Any

Assigned club

Any

FILTER

RESET

Candidate

Current Status

Assigned District/Club

Connie De

Any

Member

Any

District contacted candidate

[View Candidate Details](#)

Referral

Club reviewed inquiry

HELI VORA

Prospective member

Member

District reviewed inquiry

District contacted candidate

[View Candidate Details](#)

Relocating or returning

Joe Doughi

member

Member

Staff reviewed inquiry

Club contacted candidate

Club reviewed inquiry

Baytown

[View Candidate Details](#)

Alma Scholtisek

Prospective member

District contacted candidate

Club reviewed inquiry

Brazos River, Fulshear

[View Candidate Details](#)

Emanuel Drakes

Prospective member

5-Jul-2021

District contacted candidate

[View Candidate Details](#)

Manage Membership Leads

Candidates for District 5890

CANDIDATES

+ Add Lead

Filter  Prospect type Status Assigned club

Candidate	Prospect Type	Submission Date	Current Status	Assigned District/Club	
Connie Devine	Prospective member	19-Jul-2021	District contacted candidate		View Candidate Details
HELI VORA	Prospective member	18-Jul-2021	District contacted candidate		View Candidate Details
Joe Dougharty	Prospective member	14-Jul-2021	Club reviewed inquiry	Baytown	View Candidate Details
Alma Scholtisek	Prospective member	12-Jul-2021	Club reviewed inquiry	Brazos River, Fulshear	View Candidate Details
Emanuel Drakes	Prospective member	5-Jul-2021	District contacted candidate		View Candidate Details
Jimmie West	Prospective member	1-Jul-2021	Club reviewed inquiry	Angleton	View Candidate Details

Connie Devine

Profession: IT

Age range: 60-69

Gender: Female

Lead Type: Prospective member

Status: District contacted candidate

CANDIDATE INSIGHTS

How they heard about Rotary:

More Details:

Notes:

Interest in joining Rotary: I want to help build a strong community. Help people, know more people, give back.

They had additional comments:

Candidate Journey

Candidate Progress Type *

- Select -

CONTACT PREFERENCES



Preferred Method of Contact: Phone

CANDIDATE LOCATION INFORMATION

Meeting Preferences: Online

Daytime Location: Houston, TX, United States

Evening Location: Houston, TX, United States

Candidate Journey

Candidate Progress Type *

- Select -

District added candidate

District reviewed inquiry

District contacted candidate

District assigned candidate officer

District assigned candidate

Notes

Include any notes about this activity...

250 characters remaining

SUBMIT

Cancel

Journey History

Date	Status	District/Club	Feedback
20-Jul-2021	District contacted candidate		Stacy emailed Ms. Devine on 7/20 re: where in Hosuton.
20-Jul-2021	District reviewed inquiry		
19-Jul-2021	Auto assigned to district		

You have a new membership candidate

Dear Mrs. Stacy Brevard,

Good news! Your district has a new candidate for membership:

[Susan Gutierrez](#)

Primary Club meeting preference: Tomball, TX, United States, Wednesday, Midday

Online Meeting Preference: Yes

Lead Type: Prospective member

Referred by: No information available.

How did they hear about Rotary:

- Through a personal connection (friend or family)
- No information available.
- No information available.

Why do they want to get involved: I like being part of the communities

Step 1 – What to do now?

- Assess lead to see if location is stated

CONTACT PREFERENCES

Mobile: 832-691-0388

Email: Connie_devine@hotmail.com

Preferred Method of Contact: Phone

CANDIDATE LOCATION INFORMATION

Meeting Preferences: Online

Daytime Location: Houston, TX, United States

Evening Location: Houston, TX, United States

Step 2 – Assigning the lead

Candidate	Prospect Type	Submission Date	Current Status	Assigned District/Club	
Susan Gutierrez	Prospective member	23-Jul-2021	District assigned candidate to club	Tomball	View Candidate Details

If lead is specific
about location,
then assign lead
to a club

Email lead with
information
about club

Email club
leaders about
lead

What to do with the lead now?

Journey History

Date	Status	District/Club	Feedback
20-Jul-2021	District contacted candidate		Stacy emailed Ms. Devine on 7/20 re: where in Hosuton.
20-Jul-2021	District reviewed inquiry		
19-Jul-2021	Auto assigned to district		

- If lead is not specific with location.
- State on RI lead platform that you have contacted lead
- Email lead

Step 3... Follow up

- Follow up with lead.
- Follow up with club leaders.
- Reconcile club membership database on RI with lead spreadsheet to see if lead was admitted to club.

WHAT TO DO WITH OLD LEADS...

1. Respond to all inquiries, even old ones.
2. Assign leads to clubs you know **will respond.**

EXAMPLES OF EMAILS TO LEADS AND CLUB LEADERS



INITIAL OUTREACH (IF CANDIDATE ONLY PROVIDES “HOUSTON” FOR LOCATION IN THEIR SUBMISSION)

Dear Mr. Mouse,

Thank you for your interest in joining a Rotary club! I am the District Membership Chair for the Houston area and would love to connect you with a club that matches your interests. Since there are 63 clubs in and around Houston, could you let me know which area of the city you live and/or work in? Also, are there certain aspects of Rotary (service, professional and leadership development, fellowship, etc) that you're most interested in?

Due to COVID-19, many clubs are currently meeting virtually. Not to worry though, clubs are finding ways to make their meetings, projects, and socials fun and engaging even though they're online!

Once I hear back from you about your preferences, we'll connect you with one or more clubs that match your interests.

I look forward to working with you to find the right Rotary experience! If you have any questions, please don't hesitate to reach out.

Thanks, and have a great day!

Stacy Brevard

2ND OUTREACH (UPON RESPONSE FROM CANDIDATE ABOUT HOUSTON LOCATION AND INTERESTS)

Dear Mr. Mouse,

Thank you for getting back to me! Based on your location and interests, I think the Rotary Club of Cypress Fairbanks could be a great fit for you. I've shared your information with the club leaders, and they should be reaching out to you soon. In the meantime, I've included the club's website and meeting information below for you to review.

[Rotary Club of Cypress Fairbanks](#) (Meets Mondays at 12pm Central, via Zoom and in person)

Please let me know if you have any questions. I look forward to welcoming you into the Rotary family!

Stacy Brevard

INITIAL OUTREACH (UPON RESPONSE FROM CANDIDATE ABOUT LOCATION AND INTERESTS)

Dear Mr. Mouse,

Thank you for your interest in joining a Rotary club! I am the District Membership Chair for the Houston area and would love to connect you with a club that matches your interests. Based on the information you provided in your submission, I think the Rotary Club of Cypress Fairbanks could be an excellent fit for you. Below is the club's website, Facebook page, and meeting time for you to review.

Rotary Club of Cypress Fairbanks (hyperlinked); Rotary Club of Cypress Fairbanks Facebook Page (hyperlinked)

Club meets on Mondays at 12:00 pm Central via zoom and in person

If you have any questions, please don't hesitate to reach out. I look forward to welcoming you into the family of Rotary!

Thanks, and have a great day.

Stacy Brevard

OUTREACH TO CLUB LEADERS: (WHEN CANDIDATE IS SPECIFIC ABOUT LOCATION AND YOU'VE ASSIGNED THE LEAD TO THEIR CLUB)

Dear Club Officers and AG Minnie,

I hope you're all doing well! On ____ (date) ____, ____ (lead's name) ____ expressed interest in joining a Rotary club in your area. Based on their inquiry, I have assigned them to your club in the Manage Membership Leads tool in My Rotary. You should have received a lead notification email from Rotary International, which includes a link to your club's Manage Membership Leads page. Please follow that link to review the candidate's information, establish a relationship, and welcome them to one of your club's meetings. Also, please remember to update the status of the candidate within the tool, accordingly, following the steps in this [how-to guide](#). Even if the candidate is not the right fit for your club, you can indicate that in the tool and we'll find another club for them.

Please confirm that you've received this message and let me know if you have any questions.

Thank you and have a great day!

Stacy Brevard

RESOURCES

- **How to Manage Membership Leads for club leaders**
- **Online Membership Leads course (RI Learning Center)**
- ***<https://rotary.org/membership>***

LEAD SPREADSHEET

Last Name	First Name		Phone #	RI #	Date Contacted	District contacted	Club Referred to	Did Club make Contact	Did Lead attend a meeting	Date Joined	Notes
Toure	Didi	Aichata @ymail.com	832721023 4	10777596	1.2.2020		D5890 in Action				SAB emailed Joe on 1.17.2020 re: this potential; c
Ndolo	William	wndolo @gmail.com	719310738 6	8805379	1.4.2020		Pearland				SAB reached out via email and William emailed SAB on 7.25.2020 re: if we are still meeting!! Stacy emailed candidate on 3/14/2021 re District 5890 in Action Service Club.

TOGETHER, WE

GROW



SUMMARY

When clubs and districts check their membership leads on My Rotary frequently, follow up on their leads, and update leads' status, it helps our clubs grow by adding diverse and inspired members who have fresh ideas and energy.

This increases our impact.



QUESTIONS?

Thank You !



TOGETHER WE SEE A WORLD
WHERE **PEOPLE** UNITE AND TAKE ACTION
TO **CREATE** LASTING
CHANGE ACROSS THE GLOBE
IN OUR COMMUNITIES AND IN OURSELVES

<https://my.rotary.org/membership>

<https://rotaryregion36.org>

