

Detailed Guide: Onboarding and First-Year Management of New Rotary Club Members

Onboarding Process

Step 1: Initial Referral and Application

Action: A current member refers a candidate to the Membership Committee.

Expected Outcome: Candidate is aware of basic expectations and requirements.

Step 2: Information Gathering

Action: Candidate completes an information form and submits to the committee

Expected Outcome: Committee has sufficient background information for evaluation.

Step 3: First Meeting/Interview

Action: Candidate attends a club meeting, is introduced to members and the President, and participates in informal conversations.

Expected Outcome: Candidate experiences club culture and begins forming connections.

Step 4: Follow-Up Discussion

Action: Sponsor/member meets with candidate (e.g., over coffee) to discuss impressions and answer questions.

Expected Outcome: Candidate's interest and fit are assessed.

Step 5: Second and Third Club Meetings

Action: Candidate attends two more meetings, ideally with a Membership Committee member present.

Expected Outcome: Deeper exposure to club activities and members.

Step 6: Panel Interview

Action: After the third meeting, a panel (led by Membership Chair) conducts a more in-depth interview, covering Rotary's mission, values, history, and expectations.

Expected Outcome: Candidate receives comprehensive information and is evaluated for alignment.

Step 7: Committee Review and Recommendation

Action: Membership Committee reviews all information and interviews, then makes a recommendation to the Board.

Expected Outcome: Decision to proceed or not.

Step 8: Board Approval and Announcements

Action: If approved, candidate's name is announced in the club bulletin for three weeks, allowing for member feedback/objections.

Expected Outcome: Transparency and opportunity for input.

Step 9: Vulnerable Person Check and Final Preparations

Action: Candidate completes a Police Vulnerable Person Check. Note: this can take some time, the application should be made as soon as possible.

Expected Outcome: Compliance with safety standards.

Step 10: Induction and Orientation

Action: Arrange induction ceremony, assign a mentor, and organize an orientation program.

Expected Outcome: New member feels welcomed and informed.

Managing the First Year

Step 1: Assign a Mentor

Action: New member is paired with a trained mentor who shares interests and is committed to club growth.

Expected Outcome: New member receives guidance, support, and regular check-ins.

Step 2: Orientation Program

Action: Implement a formal orientation and development program (suggested duration: 6 months), including club activities, fellowship opportunities, training sessions, and social events.

Expected Outcome: Member is engaged, informed, and connected.

Step 3: Immediate Engagement

Action: Encourage participation in projects, committees, and events. Provide a checklist of activities.

Expected Outcome: Member feels involved and valued.

Step 4: Ongoing Support and Feedback

Action: Mentor and club leadership regularly check in, offer feedback, and address concerns.

Expected Outcome: Member satisfaction and retention.

Step 5: Personal Growth and Connections

Action: Facilitate opportunities for personal development, networking, and building friendships.

Expected Outcome: Member experiences growth and forms lasting relationships.

Step 6: Monitor and Celebrate Progress

Action: Track member's engagement, celebrate milestones, and recognize achievements.

Expected Outcome: Member feels appreciated and motivated.

Step 7: Review and Adjust

Action: At year's end, review member's experience, address any issues, and adjust onboarding/management processes as needed.

Expected Outcome: Continuous improvement of club practices.