

Brief Guide: Welcoming and Supporting a New Member

Onboarding Steps

- Referral and Application: A club member recommends someone. The candidate fills out an information form.
- Meetings and Interviews: The candidate attends three club meetings, meets members, and learns about Rotary.
- Panel Interview: A small group talks with the candidate about Rotary's values, club culture, and expectations.
- Committee Review: The Membership Committee decides if the candidate is a good fit.
- Board Approval and Announcements: If approved, the candidate's name is shared with the club for three weeks.
- Vulnerable Sector Check: The candidate completes a safety check.
- Induction and Orientation: The new member is officially welcomed, gets a mentor, and joins an orientation program.

First Year Support

- Mentoring: Each new member gets a mentor for guidance and support.
- Orientation Program: The club offers training, social events, and opportunities to learn about Rotary.
- Get Involved: New members are encouraged to join projects, committees, and events.
- Regular Check-Ins: Mentors and club leaders check in often to help and answer questions.
- Personal Growth: Members can develop new skills and make friends.
- Celebrate Milestones: The club recognizes achievements and celebrates progress.
- Feedback and Improvement: At the end of the year, review the member's experience and make improvements.

Expected Outcomes

- New members feel welcomed, informed, and supported.
- They become active participants in club life.
- The club benefits from fresh ideas and energy.
- Member retention and satisfaction increase.

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.

Rotary Club of Burlington Central

New Member Information Form

We're excited that you're interested in joining our club! This form helps us get to know you so we can make your time with us as enjoyable and rewarding as possible. The information you share will be used only within our club and won't be shared outside. Feel free to skip any questions you're not sure about or add anything else you'd like us to know. If you need more space, attach another page or send us an email.

About You

Full Name: _____

Preferred Name (if any):

Birthday: _____

Home Address (Street, Apt/Suite):

City: _____

Postal Code: _____

Best Email: _____

Best Phone (personal or work?):

Who introduced you to Rotary? (Sponsor's Name):

Your Work & Experience

Current or Most Recent Job Title:

Company Name: _____

Company Address: _____

Skills you've developed at work:

If you've changed jobs in the last 5 years

Previous Job Title: -----

Previous Company Name:

Previous Company Address:

Skills from this role:

Education & Training

Highest level of education completed:

School/College/University Name (optional):

Any special training or courses (what and when):

Community Involvement

Have you volunteered or helped in your community? Tell us about the organizations, your role, and how long you were involved:

Getting to Know You

Why do you want to join Rotary?

What skills or talents would you like to share with our club?

References (optional)

Please share the names and contact info of two people who know you well.

Name & Relationship: -----

Email: -----

Phone: -----

Name & Relationship: -----

Email: -----

Phone: -----

Rotary Club of Burlington Central

New Member Onboarding Checklist

Referral & Application

- Member referral received
- Candidate information form completed

Meetings & Interviews

- Candidate attended three meetings
- Candidate briefed on Rotary values and expectations

Panel Interview

- Panel interview scheduled
- Panel interview completed
- Notes documented and shared

Committee & Board Review

- Membership Committee review completed
- Approval decision logged
- Candidate name posted to club for 3-week review period

Vulnerable Sector Check & Induction

- Vulnerable Sector Check completed
- Induction ceremony scheduled
- Mentor assigned

- Orientation materials provided

First-Year Support: Mentorship

- Mentor–new member intro meeting completed
- Monthly check-ins scheduled
- Progress notes tracked

First-Year Support: Orientation & Engagement

- Orientation program sessions attended
- Social events attended
- Committee/project involvement started

First-Year Support: Growth & Tracking

- Skills development opportunities identified
- Participation milestones recorded
- Mid-year check-in completed

First-Year Support: Year-End Review

- Member feedback collected
- Experience reviewed with mentor
- Improvement actions defined