

Best Practices For New Member Engagement & On-Boarding



The following are the recommended best practices for engaging prospective and new members. We ask that you implement these within your Club operations.

Top 5 Best Practices for Engaging Prospective Members:

1. Connect with the prospective member and share important information about Rotary.
2. Invite the new member to a Rotary Club meeting or social event. If possible, involve the new member in a hands-on service project or fundraiser so they can experience Rotary as more than just meetings.
3. Provide the Prospective Member Brochure - Impact Begins with You:
<https://shop.rotary.org/prospective-member-brochure-impact-begins-with-you-english-set-of-5>.
4. Have the prospective member complete a Club Member Application Form and follow your Club's protocols for announcing their application for membership.
5. Review the Getting To Know Your Club Handout to fully inform your Prospective Member.

Top 10 Best Practices for Engaging Your New Members:

1. Assign a Club Mentor for 6 Months - 1 Year (vital to their club engagement/retention)
2. Induct the new member (consider inviting the DG and AG to participate)
3. Provide the new member with a Rotary [Welcome Kit](#) (we recommend it should include these items):
 - Membership Certificate, Member Pin and Name Badge
 - [Getting To Know Your Club Fillable Template](#)
 - [Getting To Know Your District Handout](#)
 - [Connect For Good Document](#)
 - [New Member Checklist](#) (MS Word Version Available on District Website)
 - [Rotary Terminology](#)
4. Ensure the new member completes the Rotary District 7090 Orientation (online or in person) Program
5. Have the new member conduct their Classification presentation within the first few months
6. Have the new member be a Club Meeting Greeter at 3 meetings within the first few months
7. After the first month, check to see if the new member has developed any specific interests in Rotary service. Get the new member connected to a committee or activity within the first few months.
8. Share details about how the new member can attend other Club meetings and meet other Rotarians.
9. Support your Club member in attending/paying for Club Leadership Training (CLT), Rotary Leadership Institute (RLI), District Conference and other training opportunities.
10. Conduct a "ceremonial congratulations" publicly recognizing the new member for completing their New Member Checklist.

Resources to Support Your Club's New Member Engagement Strategies:

- [Best Practices for Engaging Members Training Module](#)
- [Creating A Positive Experience For Prospective Members](#)
- [First Impressions Matter: The Membership Experience](#)
- [Membership Best Practices RI Forum](#)
- [New Member Orientation Guide/Introducing New Members to Rotary](#)
- [New Member Welcome Kit Available for Purchase](#)
- [Prospective Member Brochure - Impact Begins with You](#)
- [Prospective Member Exercise](#)
- Kick-Start Your New Member Orientation - Video Training Module available in the [RI Learning Center](#)