



# Best Practices for On-Boarding

Rotary Club Webinar: Best Practices for On-Boarding  
Tamara Coleman-Lawrie  
2018

# Today's Webinar Agenda

- ✓ Overview of Best Practices for New Member Engagement
- ✓ Resources to Support Your Club's New Member Engagement Strategies
- ✓ Best Practices for Mentors
- ✓ Tools for Mentors
- ✓ New Member Checklist
- ✓ New Club Resources
- ✓ District Website
- ✓ What to include in the New Member Welcome Kit
- ✓ Review of Resources
- ✓ Q&A




# Introductions to the District 7090 New Member On-Boarding Committee

Membership Director

 Kevin Crosby (Buffalo Sunrise)

Committees

New Member Orientation Committee

 Tamara Coleman-Lawrie

Recruitment Committee

 Gordon Crann

Retention Committee


 Marlee Diehl

Young Professional Committee

 Amy Gringhuis

 Jamie Perry

Rotary District Assessability Committee

 Rob Benzel

 Terrence Ho

# Best Practices for New Member Engagement



# OVERVIEW OF BEST PRACTICES FOR NEW MEMBER ENGAGEMENT

## NEW MEMBER ENGAGEMENT BEST PRACTICES DOCUMENT RELEASED

[Best Practices for New Member Engagement Document](#)

### Implementing These Best Practices Will Support Member Engagement

- Assigning Mentors
- Formal Induction
- Welcome Package Provided
- Review (and provide) the New Member Checklist
- Online Training for New Members
- Classification Presentation within the first few months
- Club meeting greeter at 3 meetings within the first few months
- Connected to a club committee/project initiative
- Provide info about other clubs, ways they can attend other club meetings
- Support your new member in attending training opportunities
- Conduct a ceremonial “new member checklist” completed congratulations

# RESOURCES TO SUPPORT YOUR CLUB'S NEW MEMBER ENGAGEMENT STRATEGY

- 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
- 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 Centre



## 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](#)

# Best Practices for Mentors



# OVERVIEW OF BEST PRACTICES FOR MENTORS

## MENTOR BEST PRACTICES DOCUMENT RELEASED

[Best Practices for Mentors Document](#)

### #1 PRIORITY: Assign a Mentor for 6 months to 1 Year

#### The Mentor is responsible for supporting the New Rotarian in:

- Understanding the various levels of Rotary
- Their formal induction and receiving and reviewing the Welcome Kit
- Obtaining their ClubRunner and RI online accounts and logins
- Accompanying the new member at club meetings and introducing them
- Completing the New Member Checklist
- Conducting their Classification/Bio presentation
- Getting connected to a committee/service project or club initiative
- Ensuring the 'ceremonial congratulations' is completed after the New Member Checklist is complete

***MAINTAINING REGULAR CONTACT  
ENSURES ENGAGEMENT & PARTICIPATION***



# TOOLS TO SUPPORT YOU AS A MENTOR

- Use the [Introducing New Members to Rotary: An Orientation Guide](#)
- Use the [Creating a Positive Experience for Prospective Members](#)
- [Rotarian Article: Mentor New Members](#)
- Help your new member sign up for [District 7090 New Member Orientation Program](#)
- [District 7090 New Member On-Boarding Committee](#) (Contact [tamara@d7090.org](mailto:tamara@d7090.org))
- [District 7090 Training Opportunities](#) (RLI, CLT and Conferences)
- [Club Resources on District 7090 Website](#)
- [Membership Resources on District 7090 Website](#)



## Best Practices For Mentors



The following are the recommended best practices for Club Mentors who are assigned to be the liaison with a new member of a Rotary Club. Best practice shows us that when new members are assigned a Mentor, they feel more welcome within a Club, they become more engaged and the Club has an improved opportunity to retain the individual as a Member.

### New Member Mentorship Guidelines:

1. A mentor guides a new Rotarian to build a strong, long term relationship with their Rotary Club, the District and Rotary International, by helping the new member understand the philosophy, policies and procedures of Rotary at various levels.
2. The Mentor may be the person who sponsored the new member to membership – or a different member of the club as assigned by the Membership Chair prior to the new member's induction.
3. The Mentor will maintain regular contact with the new member, for six months to one year, or as long as necessary, to probe interests, answer questions, and anticipate upcoming events and activities so that the new member is prepared to carry out his or her role as an effective and engaged member.
4. In addition, the Mentor will work with the new member to enrich their participation in, and strengthen, their contribution to Rotary in the following ways:
  - Provide the Welcome Kit and support the new member in reviewing these materials;
  - Guide the new member through New Member Checklist and its requirements. Accompany the new member to visit another club or any Rotary activities;
  - Support the new member in obtaining their ClubRunner and RI online accounts;
  - Frequently interact with the new member to build a strong person-to-person relationship;
  - Coach the new member in preparation for their Classification/Bio presentation;
  - Accompany the new member at club meetings and introduce them to other members;
  - Jointly review Rotary committees, helping the new member to understand the roles of various committees and determine the specific committees the new member would like to join. Introduce the new member to the chair of the committee of interest. Monitor to confirm that the relationship is successfully implemented; and
  - Ensure a "ceremonial congratulations" are publicly implemented at the Club when the new member has completed their New Member Checklist.

### Tools to Support You as a Mentor

- Use the [Introducing New Members to Rotary: An Orientation Guide](#)
- Use the [Creating a Positive Experience for Prospective Members](#)
- [Rotarian Article: Mentor New Members](#)
- Help your new member sign up for [District 7090 New Member Orientation Program](#)
- [District 7090 New Member On-Boarding Committee](#) (Contact [tamara@d7090.org](mailto:tamara@d7090.org))
- [District 7090 Training Opportunities](#) (RLI, CLT and Conferences)
- [Club Resources on District 7090 Website](#)
- [Membership Resources on District 7090 Website](#)

# New Member Checklist



# WHAT IS INCLUDED ON THE NEW MEMBER CHECKLIST

## MENTOR BEST PRACTICES DOCUMENT RELEASED

### [New Member Checklist Document](#)

- Membership Induction
- Attend the Orientation Program
- Getting To Know Your Club
- Getting To Know Your District
- Club Committees Handout
- ClubRunner & RI Login and Profile
- [Your Role As A New Member RI](#)
- New Member Section on RI
- Serve as a Meeting Greeter
- Join a Club Committee
- Classification Presentation
- Attend a Club Social Activity
- Attend a Club Fundraiser
- Attend a Club Board Meeting
- Attend Another Club Meeting
- Complete a Check-In with President
- Complete a 3 Month Check-In with your Mentor
- Complete a 6 Month Check-In with your Mentor
- Maintain Rotary Membership for 6 Months
- Be Current on Rotary Dues

# New Club Resources





## NEW CLUB RESOURCES TO HELP YOUR CLUB & OUR DISTRICT IN ON-BOARDING


- [Getting To Know Your District](#)
- [Rotary Terminology](#)
- [Club Committees](#)
- [District Committees and Leadership Opportunities](#)
- [Getting To Know Your Club Template](#)
- [Best Practices for New Member Engagement](#)
- [Best Practices for Mentors](#)
- [New Member Checklist](#)


# Engaging Your New Member in the Member Resources District Website Section


[Home](#) [Calendar of Events](#) [Club Tools](#) - [Our Rotary Work](#) - [District Operations](#) - [Newsletters](#) [Contact Us](#) -


**WELCOME TO 7090**  
**Rotary**  
District 7090  
Best of Friends 


  
**GOVERNOR REG & LORETTA  
MADISON**  
Proud Member  
Rotary Club of Brantford Sunrise


  
ROTARY:

**Help Wanted**  
Posted by Melisa Schrock  
**NUMBERS ANYONE?**  
  
District 7090 is in need of a District Treasurer for the term starting July 1, 2018. If you secretly love to categorize expenses and create color-coded pie charts, then you may have what it takes to be our next District Treasurer! Bonus points if your spouse teases you about how often you log in to the personal finance app on your smartphone! For a full job description, click [here](#). For more information, please contact Melisa Schrock DGE.

**RSS**  
**Rotaract: 50 years of changing lives**  


 **ROTARY**  
INTERNATIONAL  
OFFICIAL LICENSEE

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**WEBINARS 2018**  
  
[Click Truck for Webinar Info](#)

## NEW CLUB RESOURCES TO HELP YOUR CLUB & OUR DISTRICT IN ON-BOARDING

- Comprehensive Member Resources Section
- Easy & convenient way to engage your new Member
- Categorized into main categories and features live links to local, District and RI topics:
  - ✓ The Rotary Learning Centre
  - ✓ Your First Month As A Rotarian
  - ✓ Your First 90 Days As A Rotarian
  - ✓ Getting Deeper Into The World Of Rotary
  - ✓ Annual Training Opportunities
  - ✓ Rotary Global Rewards Program
  - ✓ Shopping for Rotary Swag
  - ✓ Other Ways to Get To Know Rotary

# District 7090 Website Membership Area Website Pages Overview



## Our Rotary Work ▾

2018 RI Convention Toronto

Public Image

Rotary Membership ▾

The Rotary Foundation ▾

Service Projects ▾

Youth Services ▾

Training

Leadership Roles & Opportunities

Welcome New Rotarians

Club Resources

Member Resources

7090 Membership Newsletters

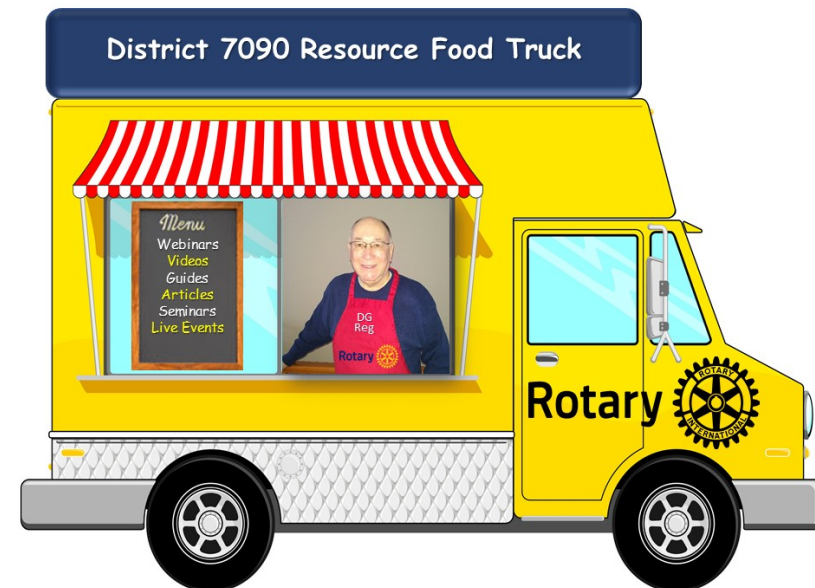
Global Rewards Program

Membership Webinars




## DISTRICT 7090 MEMBERSHIP WEBSITE PAGES

- [Membership Landing Page](#)
- [Welcome New Rotarians](#)
- [Club Resources](#)
- [Member Resources](#)
- [Membership Newsletter](#)
- [Global Rewards Program](#)



# What To Include In Your Welcome Kit



The image displays a collection of Rotary membership development materials. It includes a large blue folder with the Rotary logo, a booklet titled 'CONNECT FOR GOOD' featuring a group of people, a small blue card that says 'PROUD MEMBER' with the Rotary logo, a booklet titled 'ROTARY BASICS', and another booklet titled 'ROTARY INTERNATIONAL' showing a person in a pink headscarf. The background is a solid orange color.

MEMBERSHIP DEVELOPMENT

The New Member Welcome Kit

[ORDER NOW](#)

## THESE ITEMS WILL HELP YOUR NEW MEMBER BECOME FAMILIAR WITH ROTARY

- Connect for Good
- Club Committees Info Sheet
- District Committees & Leadership Opportunities Info Sheet
- Getting To Know Your Club Fillable Template
- Getting To Know Your District
- Member Certificate - Customize the Certificate and Print it for your New Members
- Member Pin
- New Member Checklist (MS Word Version Available Above)
- Orientation Handbook - COMING SOON!
- Rotary Basics
- Rotary Terminology

***All of these files are  
available for download on  
the Club Resources Section***

## OTHER WAYS TO SUPPORT YOUR WORK IN MEMBERSHIP DEVELOPMENT

- **Membership Reports**
- **District New Member Welcome Letters and Engagement Now Being Implemented**
- **Orientation Handbook Template for Clubs coming soon!**
- **New Member On-Boarding Survey Annual Release**
- **What other tools would Clubs require/use or feel would support them?**

