

NEW MEMBER ORIENTATION AND MENTORING TO PROMOTE ENGAGEMENT & RETENTION

Onboarding Program for the Rotary Club of _____

New members are the lifeblood and the future of all Rotary clubs. Engaging new members when they first join the club is crucial since that is when they will feel the most engaged and excited about their decision to become a member of the club. We believe that engaging them early in a way that maintains a high level of enthusiasm, while helping them to figure out how they can contribute in a way that is meaningful for them, will mitigate the risk of the new member becoming disengaged.

Far too often new members become disengaged early because they are left to figure out for themselves how the club operates, and what they need to do to get involved. Prior experience and feedback from new members indicate that the sooner a new member becomes involved in programs and activities, the more likely they are to remain with the club.

The goal of the New Member Orientation and Mentoring Program is to assist in mitigating the risk of new members becoming disengaged early. This will be achieved by providing, first, a general, one time, orientation meeting reviewing general important information about Rotary International and the Rotary Club of _____. Following Orientation, an existing Rotarian (Mentor) will be matched with a new member (Mentee) to ensure each new member feels welcome and has a clear pathway that will enable him/her to quickly engage with existing members, activities, and programs of the club.

The care and comfort of our members is of the utmost importance in our ability to engage and attract our members.

PRIP Jennifer Jones

Feeling welcomed by and comfortable with other club members is the single most important variable when it comes to both member satisfaction and member retention.

RI Research

We understand that our “club experience” is most important for membership retention and attraction.

“RI” Enhancing the Club Experience

All Rotary clubs are similar under the guidelines of Rotary International, and yet each club has differences according to the flexibilities allowed by those same RI guidelines. The following is a guide to successfully onboarding new club members in an active and engaging way. This general guide must be customized to meet the needs of the individual club. The adoption of an Onboarding plan should be approved by the club and entered into the club's By-Laws.

NEW MEMBER ORIENTATION - (Step 1)

Orientation: A short-term one-time activity or meeting

Suggested time: 1-1.5 hours in length

Required for all new members.

Can be done individually or as a group.

Presented by a club officer, Membership Chair, or mentor.

Orientation Information

It is recommended that all new members receive an overview of Rotary, including important Club, District, and Rotary International information.

Suggested topics to be covered.

1. Benefits of Rotary membership
 - A. Make a difference in the lives of others
 - B. Develop career skills
 - C. Network with other professionals
 - D. Build lifelong friendships
 - E. Make international connections
 - F. Find inspiration and have fun
2. Dues and any other financial obligations
3. Any attendance requirements
4. Club meetings: regular, Board, committee, socials (including when and where)
5. Club goals and priorities.
6. Club/District/International service projects.
7. Club and Rotary Foundation fundraising.
8. Club/District/International organization and leadership.
9. Youth and young adult programs
 - A. Early Act
 - B. Interact
 - C. Rotaract
 - D. Youth Exchange
 - E. Rotary Youth Leadership Awards (RYLA)
10. Rotary history and achievements
 - A. History of Rotary International and The Rotary Foundation
 - B. Club history
 - C. High ethical standards – The Four-Way Test
 - D. Avenues of service
 - E. Service Above Self

11. The Rotary Foundation

- A. Polio Plus
- B. Seven Areas of Focus
- C. District Grants
- D. Global Grants
- E. Global Scholars

Note: This is not an exhaustive list of topics to be covered in the Orientation. Each club should customize the list to meet the needs of their new members.

ONBOARDING A NEW MEMBER BY USING A 1 ON 1 MENTOR – (Step 2)

Mentor: A Rotary Mentor is an experienced Rotarian who has a thorough understanding of Rotary and has an appreciation for Rotary.

Mentor Qualifications:

1. Welcoming personality
2. Committed to club growth
3. Knowledgeable about Rotary
4. Time to devote to helping a new member
5. If possible, has something in common with the new member
6. Preferably, not the member sponsoring or promoting the new member
7. Will be accountable for the process

Note: Clubs should customize this list to fit their club needs. Depending on the size of the club, the club president may make recommendations to the Board for approval of interested mentors. It may also be the membership chair or mentor chair to make the recommendations.

Mentor Responsibilities:

1. Learn why the new member wants to join Rotary – expectations
2. Learn what the new member's skills and experiences bring to the club
3. Be a good listener
4. Provide information
5. Answer questions and provide guidance
6. Check-in with the new member regularly
7. Introduce the new member to other members
8. Accompany the new member to events
9. Suggest ways to get involved
10. Be a resource
11. Be a friend
12. Coach, motivate, and have patience
13. Review to reinforce the Orientation information
14. Encourage and monitor the Mentee's Rotary activities

Note: Each club should customize their list of Mentor responsibilities according to the club's needs.

Mentee Responsibilities:

These are Rotary activities meant to engage a new Rotary member and enhance their club experience. The activities should be completed within the first 6-9 months of membership. The mentor verifies the successful completion of each activity.

Participation and Service

1. Introduce yourself to other club members
2. Participate in a service project
3. Participate in a fundraising project
4. Attend a club social
5. Be a greeter
6. Attend a club Board meeting
7. Join a club committee
8. Invite a guest to a meeting
9. Visit another club
10. Bring a spouse/partner/friend to a social
11. Plan a program for a club meeting
12. Attend a District Conference
13. Attend a District Training Assembly
14. Review the Strategic Plans (Club, District, RI)
15. Read "Rotary Basics"

Get Connected

1. Visit Rotary.org
2. Log in to My Rotary
3. Log in to the club's website, Facebook page, etc.
4. Log in to the District's website – Clubrunner.
5. Review the current club goals located in Rotary Club Central in My Rotary
6. Take a course in the Rotary International Learning Center
7. Visit Brand Central in My Rotary
8. Visit Zone/Region websites – Zones 29 and 25
9. Provide new member information to the club secretary

Note: Each club should customize their Mentee activity list according to the club's needs.

Note: Rotary International research shows that the most effective and engaging way to onboard new members is to do an Orientation followed by 1 on 1 Mentoring.

Note: The Mentee activities, including both the Participation and Service activities and the Get Connected activities, can be made into a check list in order for the Mentor and Mentee to better be able to keep track of the completed activities. The checklist would be customized for the individual club.

Red Badge Program (FYI)

Some clubs use a Red Badge program to onboard new members. This means that upon acceptance of membership in the club the new member would be issued a different name badge (usually red) than the regular members wear. This signifies to the rest of the club that he/she is a new member, and is in the process of completing the engaging activities required by the club to become a regular member of the club. The activities would be similar to the mentoring activities found in this Mentoring program. Usually, the activities to be completed are on a checklist to be monitored by a mentor and new member until completion. The new member has a time period to complete the checklist, usually nine months to one year. Upon completion of the activities the new member receives a regular member name badge signifying that he/she is no longer a new member. Red Badge Programs are popular in larger clubs where the identification of a new member is necessary.

Note: Onboarding a new member using a 1 on 1 mentor is basically the same as a Red Badge program without the different badges.