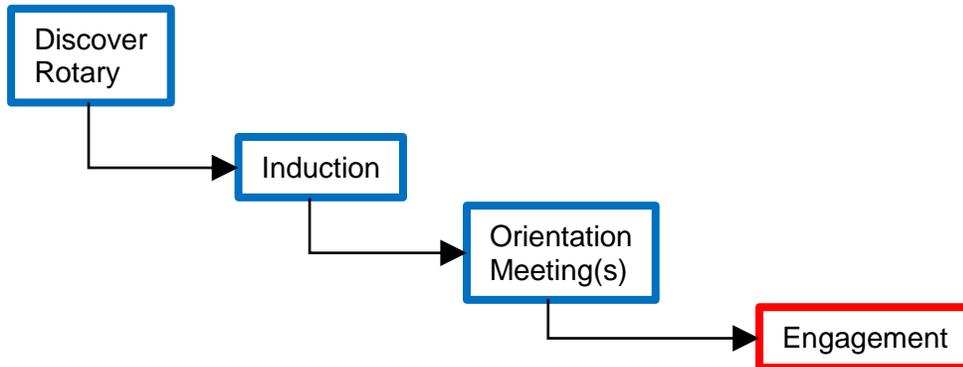


### So What is Orientation About?

**Orientation** is NOT one thing but a **Program** of activities!



To KICK-START your new member you need an **Orientation Program** of activities!

### Why an Orientation Program?

**PROGRAM** - a set of activities with a particular long-term aim.

An **effective** orientation to Rotary begins as soon as a qualified prospective member is identified.

Clubs that have a new member orientation program also have higher member **retention** rates.

Clubs have a **responsibility** to provide an in-depth informational program that teaches new members about Rotary, engages them in club activities, and welcomes them to the organization.

### Watson's Why?

I want **inspired** individuals coming into my club, willing to participate and contribute:

- To the fun and comradery of my club
- To improving the vitality of my club
- To the improvement of lives in my community and worldwide!

**I want them to stay inspired!**

### So You Have A New Member(s)

Hopefully via a **Discovery Rotary** or equivalent One-on-One Meeting, the following information was provided before they signed-up:

- What is Rotary
  - Committed to service, fellowship, diversity, integrity and leadership in the community
  - Motto
  - 6 Areas of focus *[see recently revised language]*
  - Purpose of Rotary

# Kick Start New Member Orientation

## District 7750 Membership Summit



- Qualifications for membership and expectations of participation
- Cost of membership
- After joining, What's Next

### The Induction!

Do you have a clear new member process in place leading up to induction?  
INDUCTION:

- Is this an exciting and meaningful event for your new member?
- Do you have standard and inspiring induction remarks?
- Do you have a member pledge?
- Does the club stand and welcome the new member?
- Are the new members invited up front at end of the meeting for the club to greet?

### The Induction Packet

The new member at induction should be provided with:

- Rotary Pin
- Name Badge
- New Member Packet
  - Connect for Good brochure
  - Rotary Basics guide
  - What's Rotary card
  - DACdb URL, login & temporary password
  - DACdb Basics document
  - Club directory
  - Rotary Foundation Reference Guide
  - List of any specific or special club policies

### What is an Orientation Meeting?

In comparison to how we teach prospective members about Rotary, new member orientation is more in-depth but also slower-paced, so as not to overwhelm new members with too much information.

Some clubs hold informational sessions and others have fun "start classes" in a less formal setting.

The size of your club may influence the format you choose.

Regardless of the setup, pacing the orientation allows new members to form relationships and get involved in ways that best fit their interests and needs.

**Orientation Meeting Topics**

**1. Introductions**

Start by introducing all in attendance. Example:

**New Members**

- Name
- Occupation
- Why You Decided to Join Our Rotary Club
- Questions From Discover Rotary Meeting

**Current Members**

- Name
- Number of Years in Rotary
- Why You Stay in Our Rotary Club

**2. ROTARY**

Explain:

- That your club is part of an international organization of people who share a passion for service
- Rotary's mission and values/ Avenues of Service
- Rotary's legacy in the effort to eradicate polio worldwide
- The Rotary Foundation

**3. Benefits of membership and opportunities to:**

- Make a difference in the lives of others
- Develop skills that can easily be applied to a career, like public speaking, project management, and event planning
- Network with other professionals
- Build lifelong friendships
- Make international connections

**4. Your Club:**

- Your club's culture and different kinds of meetings
- What your club does best and what it's known for

- Your club's history
- Projects and activities your club is involved in
- Social events
- Other information about your club: website, social media pages, and any other materials

### What is ENGAGEMENT?

**Engagement** is the emotional commitment a member has to the organization and its goals. When members care — when they are *engaged* — they use **discretionary effort**.

*Some other definitions:*

- Emotional connection a members feels toward his or her organization, which tends to influence his or her behaviors and level of effort in service related activities.
- Concept that describes the level of enthusiasm and dedication a member feels toward his/her participation. Engaged members care about their service and about the performance of the club, and feel that their efforts make a difference.
- The illusive force that motivates members to higher (or lower) levels of service.

### **More About ENGAGEMENT**

People engage with people, and they give more when they feel heard, empowered, and appreciated.

Member engagement (not satisfaction or happiness) matters. It's a powerful engine for growth and success. Engagement is a 50/50 proposition with the responsibility to become engaged on the member and the responsibility to create an engaged environment on the club. A culture of engagement is created when both the club and the members are becoming engaged.

For associations, clubs and other membership organizations, members are their reason for being, so getting and keeping members truly engaged in the organization is critical for survival.

***Engagement = Relationship + Action***

### Developing an ENGAGEMENT Culture

#### **1. Don't Skip Onboarding And Training**

If a member doesn't have a handle on what the club is about and how they can fit in, they won't be engaged. Instead, they'll be confused, frustrated, and rushed to catch up, which leads to disengagement. Onboarding and training new members are some of the most important steps

you can take to ensure members are engaged.

## **2. Set Club Goals**

To run a successful club, you need a club plan with a list of goals you want to accomplish. To engage members, you need to involve them in reaching club goals.

## **3. Acknowledge Members**

Members don't automatically become engaged when you give them more praise, thanks, or any other type of acknowledgment. But, can quickly become disengaged if they feel like they're invisible. Engaged members have a sense of comfortability and camaraderie with your club. It's important to develop a relationship of respect and friendship.

## **4. Focus On Member Development**

There are many reasons a person accepts a club membership. But, many members also want the opportunity to grow their career. Members want to develop their skills and continue challenging themselves. They don't want to do monotonous tasks that require minimal effort. Engaged members constantly use their mind and enhance their skills.

## **5. Don't Micromanage**

If members are told exactly what to do and how to do it, they won't have the time or motivation to engage with the activity. Members can't be engaged if they don't have freedom in how to do their tasks.

## **Steps to ENGAGEMENT**

You are off to a good start:

- **Discover Rotary** Event or equivalent
- Meaningful **Induction** Ceremony
- Educational **Orientation** Meeting

But this just the start – now you **MUST** get the new member fully **ENGAGED!**

## **ENGAGEMENT – Step 1 - Mentoring**

### **Assign a Mentor**

**Purpose:** Promote new members' involvement in your club.

Choose mentors who are committed to their role:

- High level of knowledge and interest about the club and Rotary
- Willingness to devote the time and energy necessary to help the new member fully participate
- Assign mentor with common interest with the new member

Provide training for the mentors.

**Mentor's Responsibilities:**

- Schedule a coffee break or meal ASAP. Cover mentor's checklist, and provide report back to Membership Committee.
- Accompany the new member to club events and sit with at first few meetings.
- Introduce the new member to club members.
- Follow-up on new member's comfort level and involvement.
- Explain the various club committees and suggest a committee assignment compatible with the new member's interests.
- Inform the new member about special meetings and Rotary social events. Attend as many as possible and act as an informal host to the new member, making them feel at home.

**ENGAGEMENT – Step 2 – NM Challenge**

**Have a new member activity program.**

**Purpose:** Help new member learn about your club and Rotary, and meet members.

Examples:

- Red Badge/Blue Badge
- Scavenger Hunt
- Your own new member activity program

Mentor should explain details, help and check progress.

**IMPORTANT:** Member should be recognized as a 'big deal' when complete!

**ENGAGEMENT – Step 3 – Welcome Table**

**Assign new member to Welcome Table (attendance) or Greeter for a few meetings ASAP.**

**Purpose:** Meet members and get to know their names, and for members to meet them.

**ENGAGEMENT – Step 4 – Committee**

**Get the member assigned quickly to a fundraising, service, or club operations committee – maybe more than one.**

**Purpose:** Get them involved in club activities.

The mentor should help the member decide on a committee(s), reach out to the committee chair, follow-up to be sure they have been invited to join the committee.

**ENGAGEMENT – Step 5 – Learning Sessions**

**You do have a club training plan, don't you?**

**Purpose:** Provide more in depth information about Rotary, your club, and leadership skills you can use here, in your job, and at home.

It is not possible to expose members (both new and older) to all the aspects about Rotary, about our club, and about leadership in a Discover Rotary event, Induction packet, hour long Orientation meeting, regular club meetings, or even over coffee with a mentor. And just as we think we have it, something changes.

**Clubs need to have a training plan and conduct specific sessions to educate and inspire their members!**

### **ENGAGEMENT – Club Training Plan**

Your club should have a comprehensive **training plan** that ensures:

1. Club leaders attend district training meetings as appropriate
2. Orientation is consistent and regularly provided to new members
3. Ongoing educational opportunities are available for current members
4. A leadership skills development program is available for all members.

Foremost in the training plan should be 3 sessions specifically for new members. These may be one-on-one meetings based on the inflow of new members into your club:

#### **Session 1 - Rotary Policies and Procedures**

1. How to propose a new member
2. Meeting make-ups
3. Club structure
4. Elements of an effective club
5. Club meetings
6. Attendance expectations
7. Finances (participation, contributions)
8. District structure

#### **Session 2 - Opportunities for Service**

1. Current club and district projects
2. RI programs
  - Interact & Rotaract
  - Rotary Community Corps
  - Global Networking Groups & Friendship Exchange
  - Rotary Volunteers
  - Rotary Youth Leadership Awards
  - World Community Service

- Youth Exchange
3. The Rotary Foundation programs
- PolioPlus
  - Humanitarian Grants Program
  - Educational Programs

### **Session 3 - Rotary History and Achievements**

1. Origin, growth, and achievements of Rotary International
  - History of RI and The Rotary Foundation
  - RI Board of Directors
  - The Rotary Foundation Trustees
  - Object of Rotary
  - Mission of Rotary International
2. Tradition of high ethical standards
  - The Four-Way Test
3. History and achievements of your club
4. Spouse/partner and family involvement

### **Other Topics - Leadership**

**Purpose:** To develop the personal leadership skills of club members thereby enhancing their professional life and developing future club leaders.

### **Suggested topics:**

- Communication skills
- Leadership styles
- Leading and motivating volunteers
- Mentoring
- Time management
- Goal setting and accountability
- Strategic planning
- Ethics (4-Way Test)
- Building Consensus
- Team work

**KICK-START** your new members with a great **Orientation Program** of activities!

*District 7750 Trainer*  
*Watson Dorn*  
[watsondorn@yahoo.com](mailto:watsondorn@yahoo.com)

# Kick Start New Member Orientation

## District 7750 Membership Summit



### Mentor Checklist Example

**New Member:**  
**Mentor:**

**Date:**

#### Welcome

	Welcome new member to club
	Write-up a brief bio for them ( back)

#### Information Items:

	We address members informally (no titles – use first names)
	Rotary is club focused, but RI and TRF is a huge extension of each club
	Rotary is where neighbors, friends, and problem-solvers share ideas, join leaders, and <b>take action</b> to create lasting change. (motto <b>Service Above Self</b> )
	Through Rotary clubs, people from all continents and cultures come together to exchange ideas, and form friendships and professional connections while making a difference in their backyards and around the world. [More than 1.2 million members and 35,000+ clubs]
	Each day, our members pour their passion, integrity, and intelligence into completing projects that have a lasting impact. <b>16 Million</b> volunteer hours each year
	For more than 110 years, we've bridged cultures and connected continents to champion peace, fight illiteracy and poverty, promote clean water and sanitation, and fight disease. No challenge is too big for us. [2.5 <b>Billion</b> children immunized against polio]
	Our club is over 110 members and we plan to grow to 150
	Our club provides a significant amount each year in giving, earning, and fundraising for our local community and the Rotary Foundation (see Charity Contribution List)

#### What we would like for you (new member) to do:

	Learn the 4-Way Test and live by it
	Have fun and make new friends – attend meetings, socials, & activities
	Learn about Rotary and get involved – (mentor - assign to a committee or project – see list) Committee/Project Assigned:
	Contribute to TRF
	Participate in John Welborn Challenge with our own foundation (explain)
	Attend New Member Orientation session If already attended, feedback:
	Participate in the New Member Activity program (see attachment)
	Update Profile in web site (basic info/bio and picture)

#### Questions/Feedback from new member (satisfaction so far, good things, area for improvement)

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*(continue on back if needed)*

Attachments: Last year's Accomplishments, Committee list, New Member Activity program

**Mentor Report Example**

**New Member:**

**Date:**

**Mentor:**

**Bio**

<p><b>Children/grands</b></p> <p><b>Your Rotary sponsor</b></p> <p><b>Your job profession</b></p> <p><b>Other Rotary Clubs?</b></p> <p><b>I like about Rotary</b></p> <p><b>Rotary achievements</b></p> <p><b>Interesting jobs</b></p> <p><b>Other Information</b></p> <p><b>The rest of my story</b></p>
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**Orientation feedback (if attended):**

**Feedback from New Member**

**Overall summary/feedback from mentor to committee**

**Specifics for follow-up**

**>>> Please update in Word and provide to Membership Chair <<<**