



New Member Orientation & Onboarding District Membership Chairs Education Session

Zones 25B & 29 Institute – Houston, Texas
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YOUR SESSION FACILITATOR

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- Past District Governor
- Professor Emeritus – Management
- Former Corporate Trainer
- Supporting Districts 6220, 6250, 6270



NEW MEMBER ORIENTATION AND ONBOARDING

Research shows that clubs with a new member orientation have higher member retention rates.



CHALLENGES

- Retention
- Engagement

Turnover/Terminations (20-21)

(3 sample districts)

13% = Termination (Existing)

10% = Termination (New)

Net Growth

-8% = Net New Members

ONBOARDING / ORIENTATION

District Survey

24% clubs = No Orientation
Program

49% clubs = Orientation
program not
successful

22% clubs = Members Engaged
after orientation

MEMBERSHIP PROBLEM

Ineffective orientation and onboarding of New Rotarians leads to lack of meeting their needs, resulting in high levels of turnover.

RESPONSE

Enhance the Orientation and Onboarding of New Rotarians

Goals:

- Lower stress on the new Rotarian
- Enhance Engagement
- Reduce Turnover

EXPECTATION

Onboarding and Orientation must

- Satisfy needs of new Rotarian
- Inform about the organization they joined and its expectations
- Integrate them into the Club and Rotary
- Help them feel comfortable and welcome

ONBOARDING & ORIENTATION

Onboarding:

- An ongoing process from the time an individual enters the organization until they become established.
- May last for 3 months to a year.
- Enables individual to contribute

Orientation:

- A short-term 1-time or few days event, activity or meeting
- Provides basic information, introductions and tools

Question:

At what level is presentation –
Club vs. District (or area)?

- Club Level focuses on the club and member involvement in activities
- District Level focuses on Rotary beyond the Club. (may be multi-club or entire district)
- *Most Club Orientations focus at the Club Level*

ORIENTATION

May be done by Club, Group of Clubs, or District.

ORIENTATION TOPICS

Club level:

- What is Rotary
- Introduction to Club
- Expectations for Members
- Avenues of Service
- Club Goals / Priorities
- How club operates
- Club Projects
- Club Activities
- 4-way Test & Object of Rotary
- Communication
- Celebrations
- Etc.

District Level:

- District Organization & Leadership
- District Committees & involvement
- The Rotary Foundation
 - Contributions
 - Projects / Grants
 - Areas of Focus
- Zones
- RI
- Training
- Conferences & Meetings
- Fellowships & Action Groups
- Etc.

ONBOARDING LETTERS FROM RI HEADQUARTERS



MEMBERSHIP DEVELOPMENT

New Member Engagement Email Campaign

Each year, Rotary welcomes some 150,000 new members into our clubs, and loses an equal number. Members in their first 2 years of membership are the highest risk group for leaving, making up approximately 50% of all member terminations each year. A more comprehensive introduction to Rotary, and awareness of opportunities to engage both within and beyond the club is needed to improve the retention of new members.

To complement the work that our clubs and districts are doing to help engage members, all new members will receive a series of messages directly from Rotary International over the course of their first year of membership, to help introduce them to the broad menu of opportunities to get involved and derive value out of their membership – particularly beyond their own club.

This campaign is first launching to English-speaking new members, and will then be expanded to other Rotary languages later this year.

Campaign Overview

- 1) **Welcome to Rotary! (Day 1)**
 - Trigger message sent on first day a candidate has been reported to RI as an active member
 - Content: Short video highlighting Rotary as People of Action
 - CTA: Create a My Rotary account and update profile
- 2) **Hello, new member (Day 7)**
 - Trigger message sent one week after admit date
 - Message: Get more out of your membership
 - CTA: Review Rotary Basics reference guide or online course
- 3) **Get more out of your membership (Day 30)**
 - Trigger message sent one month after admit date
 - Content: Reinforcing benefits of membership and explore how to get more out of membership
 - CTA: Interactive survey to access customized engagement opportunities of interest
- 4) **Make an impact, find connections with Rotary (Day 90)**
 - Trigger message sent three months after admit date
 - Content: Polio eradication, Rotary Action Groups and Rotary Fellowships, Annual Report
 - CTA: Read about ending polio, learn about Rotary Action Groups, and join a Rotary Fellowship
- 5) **Welcome from The Rotary Foundation (Day 180)**
 - Trigger message sent six months after admit date
 - Content: The Rotary Foundation Video, Rotary Direct and donor recognition opportunities
 - CTA: Learn about TRF and ways to give
- 6) **Congratulations on your Rotary anniversary! (Day 365)**
 - Trigger message sent one year after join date
 - Content: Happy anniversary; thank you for joining Rotary
 - CTA: Refer a potential member

Subject line: Welcome to Rotary



WELCOME TO ROTARY



Dear [First Name],

Now that you're a part of this global network, you'll connect with others who want to create lasting change around the world, in our communities, and in ourselves.

Your Rotary experience begins in your club, with opportunities to connect, collaborate, and serve the community. You can also find valuable resources on My Rotary. You'll need an account to get started. If you don't have a My Rotary account, [learn how](#) to get one. Then, sign in to [My Rotary](#) to [update your profile](#) with your skills, expertise, and any past participation in Rotary programs.

Again, welcome to Rotary!

A handwritten signature in blue ink that reads "Brian King".

Brian King
Director of Membership Development

EXERCISE

- What is the most common approach in your District?
- What is the limit of orientation?

Phases

1. Pre-Onboarding. Starts when prospective member appears.
2. Welcoming. New Member inducted.
3. Orientation. Information provided.
4. Training & Learning. Complete checklist. Meet with mentor. Participate in club.
5. Performing.

ONBOARDING PROCESS

Multi-phase

- Assign a mentor.
- Learn what member needs – why join Rotary?
- Learn what member has – skills, preferences.
- Identify ways to be involved – committees, projects, activities.
- Suggest activities – New Member Activity Checklist.
- (Part of a process/program.)

ONBOARDING KEYS

Mentor

- Check in regularly (at least monthly)
- Provide information
- Answer questions.
- Make Member Introductions
- Share tools – club website, rotary.org, Learning Center, Club Finder
- Suggest involvement – e.g., committees / projects
- Accompany to events

MENTORING

Process of several months to a year.

Activities

- Introduce self to 2 new people each meeting/activity.
- Explore Club Website
- Meet regularly with mentor.
- Attend new member orientation session.
- Attend Club Board Meeting.
- Attend District Meeting.
- Create MyRotary account on [rotary.org](https://www.rotary.org)
- Participate in Service Project
- Join a Committee
- Present Classification Talk
- Take course in Learning Center
- Attend meeting at another club (make-up)

ONBOARDING ACTIVITY CHECKLIST

Things a new Rotarian
might do to become
engaged and integrated.

EXERCISE

What should Jill Newcomer do?

What should the Club do.

(Time permitting)

Jill Newcomer was inducted as a new member of Aries Rotary. It was like a whirlwind romance. She only attended one other meeting two weeks before she joined.

No one other than her sponsor spoke to her or invited her to join a committee or project. She's heard about service, but doesn't know what to do. Someone mentioned a newsletter. Jill heard about a social that she missed. She's becoming concerned about dues, fees and expectations.

What's next...

EXERCISE DEBRIEF

What should Jill Newcomer do?

What should Aries do.

(Time permitting)

What should Jill do?

- _____
- _____
- _____
- _____
- _____

What should the club do?

- _____
- _____
- _____
- _____
- _____

- Familiar with the club and organization.
- Contributing to Rotary with time and talents.
- Engaged and involved.
- Ready to share their enthusiasm with others.
- On the path to being life-long Rotarians.

OUTCOME

New Rotarians are ...

SUMMARY

Learning Today

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- ---
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- ---

Take Away

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- ---
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- ---
- ---



QUESTIONS?

Thank You !



TOGETHER WE SEE A WORLD
WHERE **PEOPLE** UNITE AND TAKE ACTION
TO **CREATE** LASTING
CHANGE ACROSS THE GLOBE
IN OUR COMMUNITIES AND IN OURSELVES

<https://my.rotary.org/membership>

<https://rotaryregion36.org>

