New Member Orientation Meeting Agenda

1. Introductions. How did you learn about Rotary? Why do you want to be a Rotarian? How do you hope to contribute?

2. Explain we are District 6220 (approximately 18 districts) and there are 31,000 clubs in more than 160 countries. We are Club No. 2663.

3. Provide a copy of the New Member Orientation booklet. Review pages 46.

4. Provide “The ABCs of Rotary” booklet. Review the following:
   a. pages 3-4: Object of Rotary, 100% attendance, Rotary history, Paul Harris, Service Above Self
   b. page 5: 4 Avenues of Service
   c. page 7: sponsor a new member
   d. pages 10-11: Classifications, nonattendance (promote makeups), sharing Rotary with others
   e. page 18: District Conference
   f. pages 25-26: RYLA, Rotaract
   g. page 31: Group Study Exchange (GSE)
   h. pages 33-35: PolioPlus, Paul Harris Fellows, RI Web site

5. Receive and review “Personal Facts/Inventory of Interests” document. Specifically, look for:
   a. Invoice information & address
   b. Inventory of Interests (may help determine committee). Explain this will be sent to Club Treasurer who will enter onto website (encourage new members to use website) and begin to email quarterly invoices (explain invoice and optional $25 for International Foundation and $15 for Local Foundation).

6. Give each new member a copy of “Blue Badge Checklist” and review this document in its entirety. Sign and complete the first item related to Attending Orientation.

7. Review Committee List and see if they have chosen a committee to participate on. If not, choose a committee for them and have them complete this on Blue Badge Checklist.

8. Have them choose a month to be a Registration Greeter and enter the month on their Blue Badge Checklist.

9. Have them choose a day to work at the Men’s Closet and enter the day on their Blue Badge Checklist.

10. Have them choose a day to do the Classification Talk and enter the day on their Blue Badge Checklist.

11. Provide them with a list of Board members and Mentors. Indicate who their mentor is and explain the Mentor Program and the Mentor should be proactively contacted (also see page 6 of the New Member Orientation booklet).

12. Show them a copy of Rotarian Magazine and explain they will receive this. Ask for questions about anything, as a lot of information was discussed.

“Service Above Self”          “He Profits Most Who Serves Best”
13. Summarize each new member’s:
   a. Committee
   b. Greeter month
   c. Classification Talk day
   d. Men’s Closet day
   e. Mentor, as the above will need to be communicated back to appropriate person listed on the Blue Badge Checklist (see Orientation Process for New Members for more details).
INTRODUCING
NEW MEMBERS
TO ROTARY

AN ORIENTATION GUIDE
When new people join your club, you have an opportunity to connect with them and inspire them to be active members.

Research shows that clubs that have a new member orientation program also have higher member retention rates. A new member orientation program is a plan for engaging new members and acclimating them to your club. This guide can help you develop your own orientation plan or improve the one you have.

DEVELOP A NEW MEMBER ORIENTATION PROGRAM

There is no formula for an effective Rotary orientation — clubs all over the world are finding creative ways to introduce new members to Rotary. The orientation programs that are successful are those that offer a meaningful learning experience, personal connections, inspiration, and fun.

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 inform 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.

Check with your district membership attraction and engagement chair to see if your district offers a districtwide new member orientation, and encourage new members to attend.
WHAT TO COVER

Before joining, your newest members learned a little about Rotary and your club as prospective members. Build on their understanding, and answer any questions they may have. The table below offers ideas to get you started.

<table>
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<tr>
<th>ROTARY</th>
<th>BENEFITS OF MEMBERSHIP</th>
<th>YOUR CLUB</th>
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| + For context and depth, start by explaining:  
  - That your club is part of an international organization of people who share a passion for service  
  - Rotary's mission and values  
  - Rotary's legacy in the effort to eradicate polio worldwide  
  - How Rotary started and grew | + Explain the benefits of membership, including 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 | + Give new members a clearer idea of what to expect as a member of your club, including:  
  - 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 |
| + Find historical information and more on the About Rotary page or take courses such as Rotary's Strategic Plan, Areas of Focus, and Rotary Foundation Basics on the Learning Center. | + Let new members know they can also receive discounts on a variety of services all over the world through the Rotary Global Rewards program and post offers from their own companies. | + Point new members to other information about your club, including its website, social media pages, and any other materials your club has. |
| | + Find more information on video.rotary.org or the Member Center. | **Note:** Communicate financial requirements and participation expectations to prospective members before they join. |

How you decide to offer orientation to new members will reflect your club culture. Some clubs have fun activities new members have to complete in order to earn a badge, “passport,” or other type of recognition, and the program ends with a celebration. See the page 6 for a list of ways new members can get involved and learn more about Rotary. Whatever you do, make sure new members feel welcome and have an opportunity to engage with your club right away.

Your club may already have a new member orientation program. If so, just use this guide to get ideas to enhance it. Regularly evaluate your program by asking new members for feedback, and then use it to improve your program for future new members.
ASSIGN A MENTOR

Clubs around the world have found it’s useful to assign new members a mentor. The mentor should be someone who has something in common with the new member, has a welcoming personality, is committed to the club’s growth, and is knowledgeable about Rotary. Be sure that the mentor you assign has the time to devote to helping the new member become integrated into your club. While some mentoring relationships continue for some time, the first six months are the most important.

ASK MENTORS TO:

- Let the new members know how to contact them
- Check with them regularly to make sure they’re comfortable
- Introduce them to other club members
- Encourage them to invite someone they know to a meeting
- Show them Rotary’s tools on My Rotary, including Club Finder and the Learning Center, and any app your club uses
- Talk to them about open roles they could fill
- Invite them and their family members to attend the district conference
- Accompany them to events

You can offer mentor training to members to improve their mentoring skills with this leadership skills training guide.

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"[Once] new members are inducted, we give them the following:
- A mentor to help guide the new Rotarian and answer questions.
- A temporary name tag. When they have completed a “passport” checklist, we present them with a permanent badge and a Rotary club jacket at a club meeting.
- A printed club history as well as a glossary of Rotary terms and acronyms to help explain the “language” of Rotary.
- An invitation to a “fireside chat.” Twice a year, we hold these for new members and their spouses. They are held at a Rotarian’s home and are attended by several Rotarians of various ages. This provides a relaxed social setting. The objective is to give new members a chance to interact and ask questions that club meetings don’t provide."

— Brian Wilson, Rotary Club of Peterborough, Ontario, Canada
INVOLVE AND CONNECT MEMBERS

"We've grown our club from 78 to 112 by focusing on our orientations. We have a social at the chair's home [where we cover] the history and Rotary basics with everyone present reporting. ... Prior to the meeting we orient again for 1 hour with even more members speaking about their roles. In all, our new members meet 15-20 members. We ask new members when initiated that day to give us a membership moment about themselves and they will have practiced it two times during the orientations! People really get Rotary with this process."

— Cindi Hewitt, Rotary Club of Summit (Greensboro), North Carolina, USA

Prospective members join Rotary to make a difference, and they stay because of the friendships they've made. No matter how much impact your club has in the community, if new members don't make a connection with others in the club, they are unlikely to stay. Here are some ways to create a welcoming environment:

- Keep presentations brief and avoid Rotary acronyms in and outside of meetings
- Let new members know how they can involve their families

Find ways to get to know new members better and help them get to know other members. For example, some clubs give their new members access to a member directory (printed or online) with pictures and a short bio for each member. Others ask new and seasoned members to take turns each month, giving brief talks about themselves, their professions, and backgrounds.

Share your ideas on our Membership Best Practices discussion group.

Involving experienced members as mentors, trainers, celebration planners, or event speakers allows them to share insight and enthusiasm that can inspire new members. This is also a way to engage experienced members who are otherwise disengaged. Offering their experiences and advice can be enjoyable and rewarding. Many clubs find fun ways for members to get acquainted through games or interactive activities.

"New members should be treated like new employees at a company. The early months are critical for both the club and the new member, as that is when a new member will feel the most engaged and excited about their decision to join the club. So engaging them to keep that feeling high will enhance the experience for that new member, as well as the club. Like a new employee in a company, there should be an effort to make them feel welcome, training, socials to make new friends, etc. Too many times I have seen new members become disengaged early because they are left to themselves to figure it out."

— Gina McBryan, Rotary Club of Grand Cayman, Cayman Islands
HOW CAN WE ENGAGE NEW MEMBERS?

Encourage new members to get involved in some of the following ways:

- Read the Rotary Foundation Reference Guide and Connect for Good
- Introduce yourself to two new people each week
- Meet with a mentor
- Attend new member information sessions
- Attend a club board meeting
- Attend a district meeting (for example, the district conference)
- Create a My Rotary account
- Participate in a service project
- Join a committee
- Present at a club meeting
- Take an online course on the Learning Center (learn.rotary.org)
- Find information about the club (website, etc.)
- Invite a friend to a meeting
- Explore club website and Rotary.org
- Have some fun!

"Our club offers a weekly "Rotarian in the Spotlight" with a twist. We play "Three Truths and a Lie" with a member each week in an effort to get to know members better. We have found in a club our size people like to "be known," and we rotate interviewing board members, 20+ year members, and brand new members. This seems to work better than simply having someone stand up and share a few words about who they are and what they do — and it always leads to laughs!"

— Mandi Stanley, Rotary club of Madison-Ridgeland, Mississippi, USA
USE ROTARY RESOURCES

Rotary has resources to supplement your training. You can find all kinds of information about Rotary on the About Rotary page. Show new members videos about Rotary, and why members joined, on video.rotary.org. Have new members register for My Rotary and take a course or two at Rotary’s Learning Center, such as Rotary Foundation Basics, Strengthen Rotary, and Rotary’s Areas of Focus.

Order the New Member Welcome Kit for new members from shop.rotary.org.

Your members’ needs will change over time, and engaging with them at all stages of their membership, not just when they’re new, is key to keeping them happy and active in the club. To understand how to engage current members, see Improving Your Member Retention and Connect for Good.

To learn how to follow up with and engage prospective members, see Creating a Positive Experience for Prospective Members.

"In addition to Rotary new member information, our club has what we call a fireside chat. That is when a senior member of the club sits one-on-one with a new member and discusses some of the history of Rotary. There are also videos available on Rotary’s website that the whole club can view. It is always good to share these with all members. Additionally, it is always good to get new members involved. Get them on a committee, a fundraiser, or whatever seems a good fit."

— Grant Bayer, Rotary Club of Gloucester Township-Pine Hill, New Jersey, USA

"Rotary completely changed me as a person ... now I have a more mature ... responsible role to play as a global citizen. ... That’s the hidden power of Rotary ... exemplifying how Rotary can make a 360-degree impact on a new Rotarian ... needs to be incorporated [into new member training]."

— R. Murali Krishna, Rotary Club of Berhampur, Orissa, India
TAKE A FRESH APPROACH TO CREATING A MEANINGFUL CLUB EXPERIENCE

MEMBERSHIP ASSESSMENT TOOLS
Take time to address specific membership areas

CONNECT TO MEMBERSHIP LEADS
Contact interested candidates and grow your club

ROTARY CLUB HEALTH CHECK
See how your club is doing and find remedies for problem areas

BE A VIBRANT CLUB
Find ideas to reinvigorate members

STRENGTHENING YOUR MEMBERSHIP
Create a plan to give your club a boost

CONNECT FOR GOOD
Inspire members to explore ways to get involved

Available for download
www.rotary.org/membership
Orientation Process for New Members

1. Once new member is approved, Membership Committee Chair sends a welcome e-mail to the new member letting them know that they are approved. The welcome e-mail should include the following 3 attached documents: (a) Committee list (with instructions to review the committees and come to orientation prepared to join a committee), (b) “Personal Facts/Inventory of Interests” document (with instructions to complete this and bring to orientation meeting as it is for Club Treasurer for website, invoicing and RI information), and (c) the A, B, C’s or Rotary document (for informational purposes). Orientation leader is copied on the welcome e-mail which lets them know that orientation should be scheduled.

2. Orientation leader schedules orientation with new member on the next available Monday at 11:00, prior to the weekly membership meeting. Orientation leader confirms the date of that meeting with the Club President and sponsor so induction can completed at the membership meeting that day following the Orientation.

3. Prior to orientation, Orientation leader should review “Blue Badge Checklist” and contact appropriate people (all contact information is on Blue Badge Checklist) for: (a) Registration Greeter: to ensure which months are available to assist, (b) Classification Talk: to ensure available dates to schedule accordingly, and (c) Committee Chairs: to determine which committees need additional members.

4. Hold orientation meeting (see New Member Orientation Meeting Agenda for more details).

5. After orientation meeting, email “Personal Facts/Inventory of Interests” document to Club Treasurer Steve Handrick (shandrick@habco.com) so new member is added to website, begins receiving invoices and Rotarian Magazine.

6. After orientation meeting, contact appropriate people from Blue Badge Checklist to indicate the new member has been through orientation and what he/she will be participating in, including: (a) Chair of committee that new member will participate, (b) Registration Greeter: month to be a greeter, (c) Classification Talk (Club President): which date is selected, and (d) Men’s Closet representative: which date is selected. One email should be sent to the committee chair, registration greeter, Club President, and Men’s Closet representative, and copy the new member so everyone receives the same communication.

7. Process is complete.

Updated: 08/19/16
STRATEGIC PLAN

OUR VALUES IN ACTION

Through **fellowship**, we build lifelong relationships that promote greater global understanding.

With **integrity**, we honor our commitments and uphold ethical standards.

Our **diversity** enables us to connect different perspectives and approach problems from many angles.

We apply our vocational expertise, **service**, and **leadership** to tackle some of the world's greatest challenges.

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OUR STRATEGIC GOALS

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Support and strengthen clubs
- Foster club innovation and flexibility
- Encourage clubs to participate in a variety of service activities
- Promote membership diversity
- Improve member recruitment and retention
- Develop leaders
- Start new clubs
- Encourage strategic planning at club and district levels

Focus and increase humanitarian service
- Eradicate polio
- Increase sustainable service focused on programs and activities that support youth and young leaders and Rotary's six areas of focus
- Increase collaboration and connection with other organizations
- Create significant projects both locally and internationally

Enhance public image and awareness
- Unify image and brand awareness
- Publicize action-oriented service
- Promote core values
- Emphasize vocational service
- Encourage clubs to promote their networking opportunities and signature activities

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JOIN LEADERS | EXCHANGE IDEAS | TAKE ACTION www.rotary.org/strategicplan
We are leaders who act responsibly and take action to tackle some of the world's most pressing challenges.
Rotary Organization

Rotarians
1.2 Million

Rotary Clubs
34,216

Rotary Districts—538

Rotary Zones—38
17 Directors, General Secretary, President-elect & President

Rotary International
Headquarters, Evanston, IL

Business, Professionals & Community-minded people join Rotary Clubs

Club Rotarians elect Club President
Serves one year

Rotarians elect
District Governor
Serves one year

District Governor appoints district level officers and chairs to assist the clubs including Assistant Governors who are key in this category & may serve several years

Rotarians from 2 Zones elect
RI Director
serves for 2 years

Rotarians nominate
Rotary International President
Serves for one year

Coordinators appointed to work with Membership, Public Image, Rotary Foundation and The Endowment

General Secretary leads a staff of 800 at headquarters and 7 international offices

Rotary International staff available to help Rotarians, Clubs, Districts in every aspect of leading a club & district
COMMITTEES

FREE ENTERPRISE COMMITTEE
Chair: Jim Kalny James Kalny - jkalny@dkattorneys.com
Miranda Bonde - mirandabonde@ffig.com
Meeting Times:
Location:

Committee Description:

The Free Enterprise Committee is charged with the preparation for and coordination of the Free Enterprise Awards (FEA) Dinner. The committee is also responsible for managing the process of collecting nominations for and choosing the winner of the Free Enterprise Award. The FEA honors a business and community leader. Started in 1983, this has become a coveted award made up of a list of "who's who" of community leaders. The event also serves as the primary fundraiser for the Rotary Foundation of Green Bay.

The criteria for choosing the award recipient includes:

- Person nominated serves as a company or organization President, CEO, or Owner. They need to have held the title within the previous 12 months.
- Person nominated represents a business with significant growth in the community and has an office in Brown County.

Tasks include:

ROTOR YOUTH LEADERSHIP AWARDS (RYLA) COMMITTEE
Chair: Mary Beth Leopold - marybethl@theautomobilegallery.org
Meeting Times: Varies – Committee active from March through October
Location: Varies

Committee Description:

The RYLA Conference committee is annually responsible for recruiting, selecting, and sponsoring young people to attend the District 6220 RYLA Conference. The local foundation funds 6 to 8 Green Bay area sophomore and junior students annually to attend RYLA with funds from the foundation and the President and President Elect are also encouraged to attend.

The RYLA Conference purpose is to:

- Demonstrate Rotary’s respect and concern for youth
• Provide an effective training experience for selected youth and potential leaders
• Encourage leadership of youth by youth
• Recognize publicly young people who are rendering service to their communities

Key tasks include:
• Collaborating with local high schools to inform students about the conference and encourage them to apply to participate
• Reviewing candidates through an application and interview process to select up to 8 participants
• Preparing participants for their experience by helping them to compete the paperwork and discussing the process with them
• Ensuring the safe transportation of participants to and from the conference
• Providing participants with an opportunity to speak to the club about their experience at the conference

MEMBERSHIP COMMITTEE
Chair: Gina Evans gevans@johnsonbank.com
Meeting Times: First Thursday of each month from 7:30 – 8:30
Location: Kavarna

Committee Description:

The membership committee meets monthly with the following focuses:
• Monitoring and encouraging member engagement
• Tracking and improving member retention
• Growing membership numbers

Tasks include:
• Following up with meeting guests to encourage membership
• Manage the Orientation and onboarding process of new members
• Monitoring and documenting club processes to promote organization and consistency from one board year to another
• Brainstorm ideas and activities to promote increased membership

ROTARY STUDENT LEADERSHIP AWARDS (SLA) COMMITTEE
Chair: Julian LeMieux
Meeting Times: Varies
Location: Varies

Committee Description:
The Rotary Student Leadership Awards Committee is responsible for annually facilitating the selection of 2 students from each local high school in Green Bay (6 schools total) to participate. The committee interviews the students and selects 3 schools’ students to present to the club in a debate format. The club then votes on the students that they feel should be awarded. The students that are not chosen to present to the club each receive a $125 scholarship. The students that present to the club receive $1,250 for first place, $750 each for 2nd place and $500 each for third place. Funding is provided from the Rotary Foundation.

The Student Leadership Award honors students who:
1. Exhibit good citizenship in school and in the community
2. Maintain a high scholastic average
3. Uphold high moral standards

Tasks include:
- Informing each of the principals at the 6 local high schools of the date of the SLA club meeting and collaborating with them to select 2 participants (one male and one female) from their school to receive the award.
- Coordinating interviews with each of the students chosen and choosing the 3 pairs of finalists that will present to the club
- Helping the pairs of SLA recipients that are selected to prepare a 5 minute presentation on a topic of their choice for the SLA club meeting
- Requesting the funding checks from the Foundation
- Collaborating with a local print shop to design and print the SLA certificates
- Running the SLA membership meeting in April

ROTARY YOUTH EXCHANGE COMMITTEE
Chair: Jim Koehler  jim@captainswalkwinery.com
Meeting Times:
Location:

Committee Description:

The mission of RYE is the promotion of international understanding, peace and exposure to different cultures. The main involvement is with the Summer Exchange, as well as the inbound program.

The Inbound Program RYE Committee is responsible for:
- Presenting to the Board an annual application for approval of the activity and expenses
• Recruiting three host families for the yearlong inbound
• Helping these families complete application forms
• Completing a home inspection of each family as they are being considered
• Completing background checks on each host family, club president treasurer and RYE Officer
• Completing a student application and host family application that must be submitted to the District
• Making contact with inbound student and families to make them feel comfortable
• Arranging for the student’s arrival and welcome party
• Establishing a bank account for security deposit
• Managing documentation of inbound (airline ticket, visa, passport, etc.)
• Setting up academic schedule
• Transferring inbound to the host family
• Communicating with inbound families and host families throughout the stay
• Phoning the student once a week, as well as visit monthly
• Phoning the host family once per month
• Scheduling visits and presentations to the sponsoring club
• Coordinating extra activities with club members and inbound
• Attending 12 district meetings annually (by the RYE Officer and Coordinator)

COMMUNITY SERVICE COMMITTEE
Chair: Miranda Bonde - mirandabonde@ffig.com
Meeting times: Monthly meetings – dates and times TBD
Location: TBD by new chair

Committee Description:

The Community Services committee searcher for opportunities in the community for the club members to participate in a community services activity monthly. Responsibilities include:
• Collaborating with local non-profit organizations to determine needs for volunteer activities
• Scheduling monthly or quarterly community service projects
• Inform club members of service projects and coordinate needed volunteers