

Rotary Club New Member Checklist

1. Welcome & Orientation

- ☐ Send welcome letter/email with club contact details
- ☐ Assign a mentor or sponsor
- ☐ Provide Rotary materials (New Member Packet, brochure, etc.)
- ☐ Schedule a new member orientation meeting
- ☐ Add member to club communication channels (email list, WhatsApp, etc.)

2. Administrative Setup

- ☐ Collect personal and professional information
- ☐ Add new member information. Include new member sponsor(s). Contact your Club's Assistant Governor if assistance is needed.
- ☐ Issue name badge and Rotary pin
- ☐ Provide Rotary login credentials and guidance on Club, District and RI website use

3. Club Introduction

- ☐ Introduce member at a regular club meeting
- ☐ Give a brief overview of club history, structure, and leadership
- ☐ Review "attendance" and participation (engagement) expectations
- ☐ Explain dues, billing, and payment process

4. Rotary Education

- ☐ Provide information on Rotary's Five Avenues of Service
- ☐ Share information on the Four-Way Test and Rotary mottoes
- ☐ Encourage attendance at district or online Rotary learning events
- ☐ Recommend the 'Rotary Basics' and 'Learning Center' at MyRotary.org

5. Engagement & Participation

- ☐ Invite member to serve on a committee
- ☐ Encourage participation in at least one service project
- ☐ Schedule 'Classification Talk' for the new member
- ☐ Promote attendance at fellowship events and district meetings
- ☐ Share calendar of upcoming events and service opportunities

6. Follow-Up & Feedback

- ☐ Conduct a 3-month check-in with mentor or membership chair
- ☐ Solicit feedback on onboarding experience
- ☐ Encourage long-term goal setting (e.g., leadership roles, Paul Harris Fellow, etc.)
- ☐ Provide a copy of the Rotary Club's Constitution & ByLaws