

New Member Onboarding - Checklist

Use this checklist to ensure that new members experience a positive and efficient joining process, are educated about Toastmasters and their obligations, and are properly supported throughout their first few months as a member.

For each task, use the suggested Key Documents as resources to help educate the new member, and note the completion date of each activity under the Date Complete column once done.

Club Name:

Member Name:

STAGE	TASKS	KEY DOCUMENTS	DATE COMPLETE
Joining (VPM)	Membership application form has been fully completed, and received and filed by VPM	Membership Application Form (#800)	
	Pro-rata membership dues and joining fee (if applicable) have been received by the club		
	Physical or digital vote to accept new member has been passed by club members		
Administration (VPM &/or Treasurer)	Welcome email sent to new member explaining next steps of onboarding process		
	New member created in Club Central		
	Toastmasters International dues paid through Club Central		
	New member badge ordered		
Orientation (VPE)	Orientation session held by VPE which includes:		
	- discussion of member learning needs and achievability	Orienting New Members (#1167J)	
	- completion of New Member Profile Sheet	New Member Profile Sheet (#1162F)	
	- explanation of club responsibilities to member		
	- explanation of member responsibilities to club and Toastmasters Promise	Toastmasters Promise (#402)	
	- overview of Toastmasters International and District structure	Map of Service to Members	
	- explanation of how club operates, meeting assignments, club officers, etc.	A Toastmaster Wears Many Hats (#1167D), The Navigator (#8722)	
	- explanation of education program, evaluations, and learning opportunities outside the club		
	- introduction to TI website and resources for new members	www.toastmasters.org	

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Pathways Orientation (VPE)	Pathways orientation session held by VPE which includes how to:		
	- log in to the Toastmasters International website	www.toastmasters.org	
	- access Pathways and select a path		
	- navigate the Base Camp user interface		
	- access Base Camp and launch member's learning path		
	- launch projects and navigate through to completion		
	- download project resources and evaluation forms		
	- access learning materials in Tutorials and Resources		
	- upload files to the member's document storage		
Induction (VPE+VPM)	A mentor has been assigned to the new member and a first catchup scheduled	Mentor Kit (#1163A-E)	
	New member information kit provided	The Navigator (#8722)	
	Ice Breaker project provided with explanation	Ice Breaker (#8101)	
	Ice Breaker delivery date scheduled		
	New member induction ceremony completed, and badge provided	Induction Ceremony for New Members (#1162C)	
Follow Up (VPE)	After Ice Breaker:		
	- member is scheduled to undertake minor meeting roles		
	- remaining Level 1 project speeches scheduled		
	- member is scheduled to undertake evaluation roles		
	- member is scheduled to undertake Topicsmaster and Toastmaster roles		
	- member is made aware of speech contests and invited to participate	Speech Contest Rulebook	
	- member has been invited to attend Toastmasters events outside club		
	After Level 1 completion:		
	- follow up meeting with member to discuss progress toward goals	Member Interest Survey (#403)	
- member encouraged to commence Level 2			

STAGE	TASKS	KEY DOCUMENTS	DATE COMPLETE
	- member encouraged to consider club leadership or committee roles	Club Leadership Handbook (#1310)	
	- member assigned as buddy for guests at meetings		
	- new mentor assigned to member if desired	Mentor Interest Survey (#1163A)	
	After Level 2 completion:		
	- member encouraged to mentor new members	Mentor Interest Survey (#1163A)	
	- member introduced to Pathways Mentor Program	Prepare to Mentor (#8311)	
	- member invited to participate in International Speech Contest	Speech Contest Rulebook	

Instructions:

At each stage of the onboarding process, the club VPM and VPE work together to ensure that all activities are completed. Your club may choose to delegate responsibility for undertaking some of these tasks to other members to help lighten the load on the club executive.

As executive committees change over, ensure that any unfinished checklists are passed on to the VPM and VPE successors so that new members continue to be supported through their first few months.

The club should maintain a copy of this document for each new member who joins until they complete all activities or leave the club.