

Onboarding Steps/Overview

1. New members express interest by filling in the [Interest Form](#).
 - The responses to the interest can be found on the subscribers page of MailerLite
2. Create/update MailerLite event form for upcoming onboarding session/potluck social. The event form should include RSVP options for both the potluck social and onboarding.
3. Send MailerLite event form to:
 - Newsletter (around 1st of the month)
 - People who have subscribed to the mailing list since the last onboarding (see email template [here](#))
 - Other organizations/outlets, such as 730 DC, Free DC, and Ward 2 Mutual Aid (optional, but encouraged)
4. Check RSVPs periodically (no automatic notifications when new responses received). Form responses are populated in a table under "Events" in MailerLite.
5. Send reminder to those who have RSVP'd on/around the day of the event.
6. Confirm number of attendees for onboarding (check on the day of the event at a minimum) and collect emails/names for expected participants, which can be found from export of MailerLite table.
7. Hold onboarding meeting:
 - Gather materials: QR code sheet for [membership/dues](#), [list of tasks & roles](#), list of products, sign in sheet, and zine if available.
 - Manage door/phone number for arrivals.
 - [Give presentation](#) for onboarding and hold Q/A.
 - Show shop to participants.
 - Verify interested people, give QR code sheet or note on sign up sheet.
8. Send follow-up email to onboarding attendees with reminder to sign membership agreement and pay dues (see template [here](#)).
9. Check for [dues payments](#) and [membership agreements](#) daily for a week after onboarding meeting.
10. Once people have paid dues and signed membership agreement:
 - Send an email with link to join WhatsApp community (they should join General Chat at a minimum) and instructions on how to sign up for wiki and [Meso app](#) (see template [here](#))
 - Add them to Airtable and Google Group
11. New members are considered "trial members" for 3 months after signing the membership agreement. Details on trial membership can be found [here](#).

Revision #10

Created 5 April 2026 22:10:16 by Drew Beall

Updated 7 April 2026 20:04:02 by Hadley Ashford