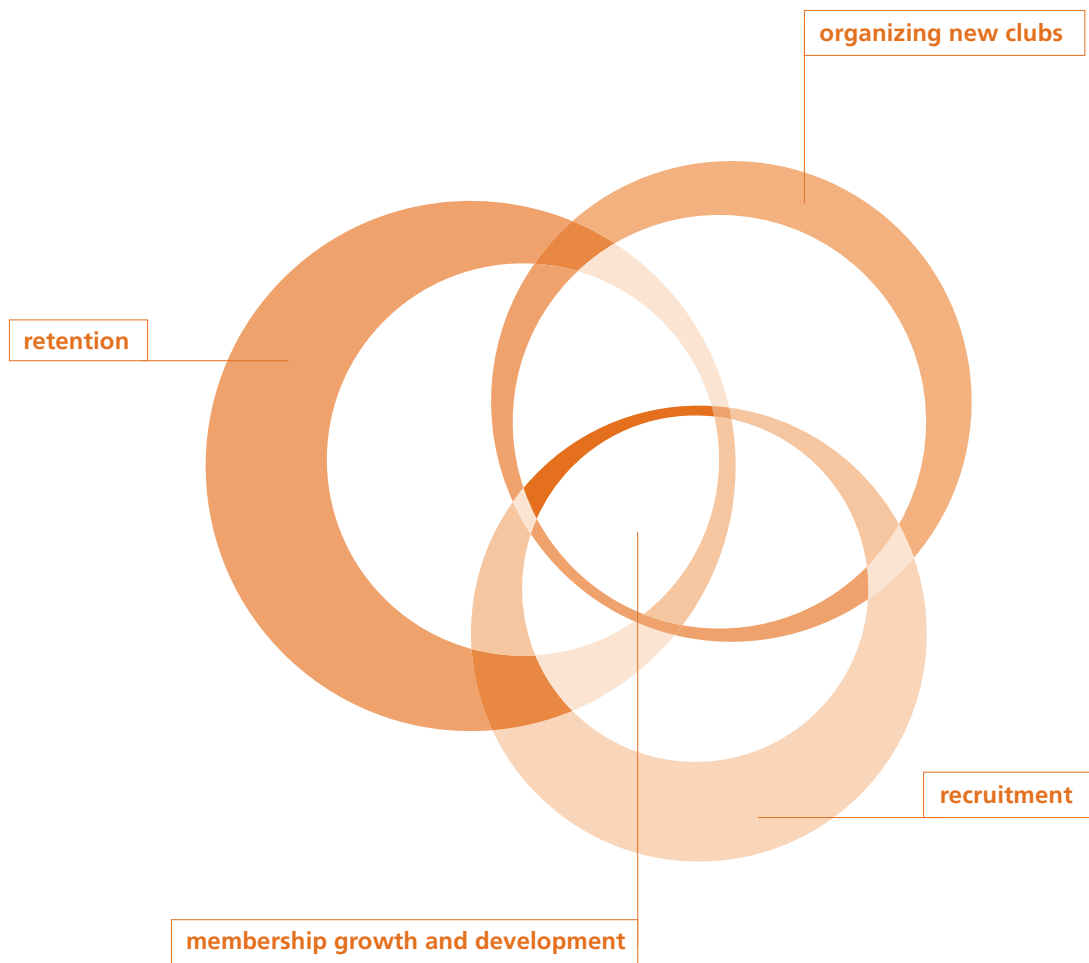


# Organizing New Clubs

A Guide for District Governors and Special Representatives



ROTARY INTERNATIONAL®



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# Introduction

Organizing a new Rotary club requires a great deal of time and work, but many Rotarians have found it to be one of their most rewarding experiences.

There are many reasons to start a new Rotary club. Perhaps there are potential qualified members in a community who would like to join Rotary, but they would prefer a meeting time that better suits their schedules or want to meet online via a Rotary e-club. Maybe one existing Rotary club can no longer accommodate growth due to limitations in meeting facility space of the current club. Some circumstances might even call for a club that conducts its meetings in a different language. All of these scenarios, and many more, may suggest there is a need for a new club.



Find your CDS  
representative at  
[www.rotary.org/cds](http://www.rotary.org/cds).

The district governor facilitates the development of new clubs in the district. Rotarians interested in organizing a new Rotary club should contact their district governor. The Rotary International Club and District Support (CDS) representative for a particular area also can be of assistance to district governors or others interested in learning about how to start a new Rotary club.

This publication provides guidance in organizing a new Rotary club for district governors and their special representatives. The required forms that must be submitted to RI are also included in this publication. **For your convenience, the forms in the online PDF version are formatted for editing — all fields, except for the required signatures, may be completed electronically. Hard copies must be printed, signed, and mailed to RI.**

Because local circumstances vary throughout the Rotary world, the process for organizing a new club outlined in this guide serves as a starting point, ensuring minimum RI requirements are met. Additional actions may need to be taken based on local Rotary traditions and legal requirements of specific jurisdictions. Use the recommended actions for each stage of new club development, including the action-step checklists and suggested resources, as you work toward the successful chartering of a new Rotary club.

A 2010 Council on Legislation enactment recognized Rotary e-clubs as part of Rotary International, following a six-year pilot project. While the vast majority of practices described here apply to Rotary clubs as well as Rotary e-clubs, there are some special considerations when organizing a Rotary e-club. Refer to appendix 7 for further guidance on e-clubs. Unless otherwise specified, references to clubs throughout this guide also apply to Rotary e-clubs.

# Roles and Responsibilities of the District Governor

Organizing a new Rotary club requires careful supervision by the district governor and the cooperation and support of many people.

The organization of new clubs is the responsibility of the district governor (RI Bylaws 15.090.), under the general supervision of the RI Board. The district governor appoints a district extension committee to develop and implement a plan for organizing new clubs, and **either serves as or appoints a special representative** to coordinate extension efforts for each new club. He or she determines the duties and authority to delegate, communicates his or her ideas to the special representative regarding working with the sponsor club(s) and recruiting charter members, and engages other Rotarians in ensuring the success of each club.

The district governor's primary responsibilities are outlined in this chapter, with additional explanation about Rotary e-clubs in appendix 7. As district governor, you should communicate with your special representative about the role you will take in the process. Each district governor may approach this process differently, some taking a more hands-on approach, others delegating most of the responsibilities. And each situation is different — the organization of new clubs results from many different circumstances, each bringing unique considerations to the table. Because the duties of the special representative should continue for at least one year after the club is chartered, consultation with the district governor-elect and possibly the district governor-nominee is also recommended. Consider the checklist action steps in this publication as a starting point as you determine your own strategy for successfully engaging in the process of organizing a new club in your district.



Use the planning worksheet on page 39 to begin developing a timeline for organizing each new club.

Appendix 1 contains a planning worksheet for organizing a new Rotary club that you may wish to use as you initially set goals for yourself and your special representative.

## APPOINT MEMBERS TO THE DISTRICT EXTENSION COMMITTEE

The district extension committee develops and implements a plan to organize new Rotary clubs within the district, under the direction of the district governor. The committee has the following responsibilities:

- Identifying communities without Rotary clubs that have a population capable of meeting the requirements for chartering a new club
- Identifying communities where additional Rotary clubs could be established without negatively effecting any existing club
- Assisting in organizing and establishing new clubs

The minimum recommended qualification for appointment to a district extension committee is active membership in good standing in a club in the district (Rotary Code of Policies 17.030.3.). Preference should be given to past district governors or other experienced Rotarians who have been active and successful in establishing new clubs.

#### *Action steps:*

- ☐ Determine who you will appoint to the district extension committee and when you will appoint them.
- ☐ Communicate the responsibilities of the district extension committee, as well as your expectations of the committee, to the committee members.
- ☐ Provide oversight for the committee's activities.
- ☐ Consider the methods of communication you will use to stay in contact with the committee.

### **INITIATE THE NEW CLUB SURVEY**

When the district extension committee identifies a potential need and locality for a new club, the district governor is charged with completing the required New Club Survey (see page 23).

#### *Action steps:*

- ☐ Appoint a Rotarian to be the official surveyor of the prospective locality. This individual should be familiar with the area so that he or she can determine whether it can support a new club.
- ☐ Initiate a search for a sponsor club (if not yet identified).
- ☐ Determine, in coordination with the surveyor, whether the prospective locality has enough qualified businesses and professionals to maintain an additional club of at least 25 active members under Rotary's classification system.

### **APPOINT A SPECIAL REPRESENTATIVE AND SPONSOR CLUB(S)**

The special representative will be your primary point person for recruiting and working with charter members. The special representative will be instrumental in the success of the new club, so choose this person carefully.

He or she also works closely with the sponsor club(s). As such, it is preferable that the special representative is a member of the sponsor club. You are required to designate your special representative and sponsor club before submitting the New Club Survey to RI. In some areas of the world, where geographical circumstances make it difficult for the special representative and sponsor club to meet regularly and play a significant hands-on role, the district trainer becomes an important resource to consider.

Although a sponsor club is not required, it is strongly recommended; sponsor clubs can help ensure that a new club is successful in building a strong foundation in membership, service, and fellowship. New clubs may have more than one sponsor, but at least one sponsor club should be located near the new club. A sponsor club should meet these requirements:

- Good financial standing with RI
- Membership of at least 20 active members
- Well-rounded program of Rotary service



Provide the official surveyor with the New Club Survey on page 23.



A dedicated special representative is instrumental to the success of the new club. When circumstances permit, some district governors assume the role of special representative themselves.



Provide the potential sponsor club(s) with copies of the Sponsor Club Form (page 25). Communicate your expectations of the potential sponsor club(s) to the club officers, along with a deadline for acceptance of the position.

The sponsor club has these general responsibilities:

- Assisting the special representative in planning and organizing the administrative processes of the new club
- Helping to organize the new club's programs and projects
- Guiding the new club in its development as a member of RI
- Reporting to the district governor as requested during the club's first year
- Serving as a mentor to the new club for preferably two years after its admission to membership in RI

RI research indicates that new clubs, particularly in their first and second years, need a strong support system. In fact, the biggest losses in membership, as well as most club terminations, occur in a club's second year of existence. A club that has the strong support of a sponsor club well into its second year has a greater chance of becoming a strong, self-sufficient, and productive club.

Consider the advantages of a multiclub sponsor approach:

- The new club has a stronger support system since the differences in each of the sponsor clubs allows the new club to experience a wider variety of ideas
- The time and effort to work with the new club is not on the shoulders of one club or a few Rotarians
- Larger network to recruit charter members
- Shared financial support

#### **Action steps:**

- ☐ Appoint your special representative, and provide a copy of this publication to him or her.
- ☐ Decide which duties and responsibilities you will delegate to the special representative (see chapter 3).
- ☐ Develop a plan for regular communication with the special representative.
- ☐ Communicate your expectations to the special representative.
- ☐ Consider involving the district trainer in the process of organizing and training the new club.
- ☐ Discuss your preliminary planning timeline (see appendix 1) with the special representative.
- ☐ Determine the roles that you and the special representative will play in working with charter members.
- ☐ Identify potential sponsor club(s). Consider the advantages of a multiclub sponsor approach.



District governors may review the Report of New Club Trends and other RI research at [www.rotary.org/en/membershipresources](http://www.rotary.org/en/membershipresources).

- ☐ Educate the potential sponsor club(s) about the responsibilities involved, or delegate this responsibility to the special representative. (Find out more in chapter 3.)
- ☐ Send the Sponsor Club Form to the club president of the sponsor club.
- ☐ Ensure that the sponsor club has held a formal vote of its membership to determine whether the entire club backs the effort to support the new club.

### **SUBMIT NEW CLUB SURVEY AND SPONSOR CLUB FORM TO YOUR CDS REPRESENTATIVE**

Both the New Club Survey and the Sponsor Club Form must be completed in their entirety, including all signatures, before submitting them to RI. (To complete the forms electronically, access an online version of this publication at [www.rotary.org/downloadlibrary](http://www.rotary.org/downloadlibrary)). Type the information into the forms, and then print, obtain necessary signatures, and mail them to RI.

#### **Action steps:**

- ☐ Determine, along with your special representative, the specific responsibilities that you expect your sponsor club to carry out.
- ☐ Ensure that either you or your special representative has communicated these responsibilities to the potential sponsor club before the club agrees to participate.
- ☐ If you have elected not to appoint a sponsor club, provide a detailed explanation for your decision.
- ☐ Obtain all necessary signatures, and review the forms before submitting them.
- ☐ Contact your CDS representative with any questions before submitting the forms.

### **RECRUIT CHARTER MEMBERS**

Charter members are the founding members of a club. They are elected to membership before the club is admitted to RI. Fifty percent of the charter members of a club must be from the local community. As district governor, you determine what role you will play in working with charter club members. You should have a communication plan in place so that you, your special representative, the sponsor club, and the charter members are all actively contributing to the success of the new club. Also consider the role that your assistant governors will take.

Communicate the general responsibilities of charter club members to them, either personally or through your special representative. These responsibilities include:

- Identifying charter members
- Verifying balance of charter members' classifications
- Establishing club name
- Adopting the Standard Rotary Club Constitution
- Determining meeting location and time
- Adopting club bylaws and committee structure
- Electing club board and officers
- Establishing club fees and dues

Chapter 3 contains more information for special representatives to communicate to charter members.



Contact your CDS representative with any questions about completing forms.



### **Action steps:**

- ☐ Determine the role that the district governor will assume in recruiting charter members. Will you be hands-on, or will you delegate most of the responsibilities to the special representative, sponsor club, and organizing group of charter members?
- ☐ Develop an action plan for working with or training the special representative and the sponsor club to recruit charter members.
- ☐ Encourage a balance of classifications in the new club.
- ☐ Establish an appropriate orientation and education program for prospective and charter members.

### **GRANT PROVISIONAL CLUB STATUS**

The district governor gives the organizing group interested in forming a new club the designation “provisional club” after it meets weekly and has elected club officers who will subscribe to the Standard Rotary Club Constitution. This designation entitles the provisional club to issue make-up meetings to visiting Rotarians.

### **Action steps:**

- ☐ Ensure that the special representative and sponsor club members are fully aware and well-trained about their roles in providing a Rotary education to charter members.
- ☐ Develop a communication plan to ensure the district governor, special representative, and sponsor club are regularly communicating about their efforts and involvement in educating prospective and charter members.
- ☐ Answer any questions the provisional club may have about its adopted club bylaws.

### **REVIEW THE NEW CLUB APPLICATION, AND SUBMIT FOR RI BOARD APPROVAL**

Once the provisional club has 25 active charter members with a balance of classifications, the New Club Application can be submitted to RI. The list of members submitted on the form is considered the club’s complete charter membership list; no other members can be elected to the club until the RI Board has approved the application.

The club charter membership list is a crucial part of the New Club Application, and lists are checked for accuracy. As district governor, your signature on this form sent to RI indicates that you have verified all the information it contains, including assurances that the individuals listed on the charter membership list have been informed of their presence on the list.

Submitting inaccurate membership lists has serious consequences:

*When a new club seeking a charter submits an inaccurate membership list the general secretary shall take the following action:*

- a. withhold granting the new club charter;*
- b. notify the district governor that the charter will not be released until all names on the new club membership list have been verified, and that all future new club applications from the district during the Rotary year will undergo scrutiny;*
- c. notify the district governor that the submission of the inaccurate membership list has made him/her ineligible for any RI assignment for three years after his/her term as governor ends.*

(Rotary Code of Policies 18.050.15)



Find the New Club Application on page 27.

**Action steps:**

- ☐ Verify all of the information included on the New Club Application.
- ☐ Review the application for completeness and legibility.
- ☐ Validate that there is a balance of classifications in the new members by reviewing the classification worksheet your special representative has completed.
- ☐ Include the correct charter fee along with the application.
- ☐ Contact your CDS representative with any questions.
- ☐ Send the New Club Application to your CDS representative for RI Board approval.

**PRESENT THE CHARTER TO THE NEW ROTARY CLUB**

The charter for a new club, signed by the president of RI and bearing the official seal, is sent to the district governor, usually within four weeks of the club's admission to membership. The district governor also signs the charter.

After you have been notified that the application has been approved and the club is operating effectively, work with your special representative and the new club officers to set the date and time for the charter presentation. *Under no circumstance should the date for the charter presentation meeting be set until the application for membership has been approved*, in case of unexpected delays obtaining approval.

See chapter 6 for information on organizing the charter presentation meeting.

**Action steps:**

- ☐ Determine how long it will take your special representative and the new club officers to organize the charter presentation meeting.
- ☐ Communicate any ideas to your special representative, beyond those presented in chapter 6, that you want to incorporate into the charter presentation meeting.
- ☐ Discuss with your special representative the dissemination of a news release to the local media.

The district governor is strongly encouraged to maintain contact with the new club after it is chartered and remain involved in its continued development. The outgoing district governor should provide the district governor-elect with a list of all special representatives who are assisting with the process of organizing new clubs.

# 3

## Roles and Responsibilities of the Special Representative

The district governor appoints a well-informed Rotarian from a nearby club, preferably the sponsor club, as special representative for organizing a new club. The special representative has the authority to represent the governor in organizing the club. The district governor determines the representative's exact duties and authority as is appropriate for the district.

In carrying out your responsibilities as special representative, you may be involved in some or all of the following activities. Be sure to communicate with the district governor so that you have a complete understanding of your responsibilities. The steps included in this chapter generally — but not always — occur in the chronological order outlined.

Your primary resources for successfully conducting your role as special representative include your district governor, this manual, the *Manual of Procedure* (035), and your RI Club and District Support (CDS) representative.

### CONVENE A PLANNING MEETING WITH THE SPONSOR CLUB AND ORGANIZING GROUP

This meeting's purpose is to introduce the founding members of the organizing group to the sponsor club members and begin building a relationship. The special representative should facilitate the two groups getting to know each other and help them establish guidelines for how they will work together in the coming year(s).

Invite the prospective qualified charter members of the new club as well as the district governor and the president of the sponsor club. Ask the sponsor club president to invite additional members of the sponsor club to attend.

Use the meeting to brainstorm, set goals, and get acquainted. Discuss ideas for recruiting charter members. Use the guidelines included in the Standard Rotary Club Constitution as a starting point.

#### Suggested agenda for the meeting:

- Review the membership provisions of the Standard Rotary Club Constitution
- Plan for future recruitment efforts

Consider the following resources as you discuss recruitment with the organizing group:

- Leading businesses and organizations in the area, and people associated with them who would be qualified for Rotary membership
- Current Rotarians in neighboring clubs who might find the meeting time of the new club more convenient
- Former Rotarians in the area
- Rotary alumni or other beneficiaries of an RI or Rotary Foundation program (for a list of former alumni in your area, e-mail [alumni@rotary.org](mailto:alumni@rotary.org))
- Former or current Rotaractors



Convene your planning meeting *after* the New Club Survey is approved but *before* actual organizational work begins.



Review the frequently asked questions found on page 35 in preparation for the planning meeting.

- Retirees in the area who previously held executive positions
- Local and business phone directories
- Directories of other professional groups within the locality
- Graduates of business schools



Encourage the organizing club to purchase educational resources for prospective member information sessions:

- *Prospective Member Information Kits* (423) or individual components of the kit — *Welcome to Rotary folder* (265-MU), *Rotary Basics* (595), *This Is Rotary* (001), *What's Rotary?* (419), *Rotary's US\$200 Million Challenge Brochure* (986), and *Rotary Foundation Facts* (159)
- *Membership Video Set* (427)
- *This Is Rotary DVD* (449)
- *Rotary's US\$200 Million Challenge* (985-DVD)
- *Rotary and the International Community: Connecting the Local to the Global* (266-DVD)

#### **Action steps:**

- ☐ Ask the district governor to fully outline his or her expectations for you and your role in the process of organizing the new club.
- ☐ Discuss the sponsor club mentoring relationship with the members of the organizing club so that they have an opportunity to voice their wants and needs from the sponsor club.
- ☐ Determine how often members of the sponsor club will be in contact with the organizing club. Encourage a strong working relationship between the organizing and sponsor clubs.
- ☐ Develop a communication plan for everyone involved in the process. How will you communicate with the organizing group of charter club members and the sponsor club? How will the sponsor club communicate with the organizing group? What are the preferred methods of communication for all parties involved?
- ☐ Divide responsibilities among the organizing club, sponsor club, and special representative for recruiting prospective charter members.
- ☐ Outline a process and timeline for completing documents for the admission of the new club.
- ☐ Encourage the organizing club to distribute materials from RI to prospective members, and decide who will order these materials. Access the online *RI Catalog* at [shop.rotary.org](http://shop.rotary.org) to find the latest publications available.
- ☐ Ensure that any questions the organizing members have about Rotary or the organizing process are answered in a timely fashion.
- ☐ Provide the organizing members with a copy of the *Manual of Procedure* (035).



Encourage the sponsor club to utilize RI resources as it works with the charter club.



*New Member Orientation: A How-to Guide for Clubs (414)* serves as a valuable resource to help the charter club develop a prospective and new member education program.



Encourage the charter and sponsor clubs to find recruitment resources in the *Membership Development Resource Guide (417)* and *Club Assessment Tools*. Download both at [www.rotary.org/en/membershipresources](http://www.rotary.org/en/membershipresources).

## COMMUNICATE RESPONSIBILITIES TO THE SPONSOR CLUB

A new club's success depends on how well it is organized and how well it operates in the first few years. The sponsor club plays a vital role in this success. Your role as special representative is to ensure that the sponsor club is actively mentoring the new club. Since most clubs haven't served as a sponsor club in the past, engaging in an open dialogue with the sponsor club about the responsibilities and expectations of the sponsor club is an important responsibility of the special representative.

The sponsor club should act as mentor to the new club, both before and after the club is chartered. Work with the sponsor club in the planning and organizing of the administrative processes of the new club, and discuss specific examples of how the sponsor club will help mentor the new club in its early programs and projects.

### Action steps:

- ☐ Ensure that discussions have begun with the organizing members about the administrative processes of a Rotary club.
- ☐ Solidify the role that the sponsor club will play in the recruitment of prospective members.
- ☐ Develop a formal orientation program for prospective members, in cooperation with the charter members and sponsor club.
- ☐ Determine when the new club will be ready to hold its first meeting, and communicate this information to the district governor.
- ☐ Work with the organizing members, district governor, and the sponsor club in the planning of the first 8 to 10 meetings.
- ☐ Ensure the sponsor club leaders are ready to serve as mentors.

## RECRUIT PROSPECTIVE CHARTER CLUB MEMBERS

Encourage charter members to serve as the primary recruiters, emphasizing that they are the builders of their club. Continue educating charter members about Rotary so that they can, in turn, proactively and accurately talk to prospective members about Rotary. Encourage the sponsor club members to promote the many benefits of Rotary club membership to prospective charter members and invite prospective charter members to participate in the sponsor club's service projects and special events.

As the special representative, you should communicate the importance of membership diversity to the charter members. International understanding and goodwill begin with the application of the same principles within each club. Assess whether the prospective member list represents the ethnic, age, and religious diversity of the community. Does the gender make-up reflect that of the professional community? If not, communicate your concerns to the charter club members. If so, congratulate the charter club on its work.

You are also responsible for ensuring a balance of classifications in the charter membership and for submitting the Classification Worksheet (appendix 2) to your district governor. All Rotary clubs should aspire to reflect the business and professional make-up of the community. This concept, known as the classification principle, is a fundamental building block of RI. It is the special representative's duty to explain this concept to the organizing group, communicate the official policy to them, and encourage the recruitment of a diverse club.



Find the New Club Member Classification Worksheet in appendix 2.

#### Action steps:

- ☐ Create an estimated timeline for working toward provisional club status.
- ☐ Assist the charter club members in distinguishing what they will emphasize about the new club to prospective members. Why might prospective members be drawn to the new club? What characteristics make it different from other clubs in the area?
- ☐ Discuss the importance of membership diversity with the sponsor club and the charter club members. The sponsor club should be continuously promoting membership diversity as an essential element of recruiting new members.
- ☐ Provide the organizing group with copies of the diversity and classification policy from the *Manual of Procedure* (035), RI Constitution, and the Standard Rotary Club Constitution.
- ☐ Work through the classification survey, the membership diversity profile, and the 25-minute membership survey, which are found online in *Club Assessment Tools*, with the charter club members. Involve the sponsor club in these activities.
- ☐ Determine when the new club will be ready to hold its first meeting. Work with members of the sponsor club in assisting the charter members with the planning of the first several meetings.
- ☐ Complete the Classification Worksheet for review by the governor.

#### HELP CHARTER CLUB MEMBERS WITH CLUB OPERATIONAL DUTIES

The more education and mentoring that charter club members get about club operations, even before the club is awarded its charter, the more likely the club is going to operate efficiently and effectively once it does obtain its charter. Each of these bolded points below should be communicated to the charter club members, and the special representative should see to it that the charter club members understand these points and that they know who to seek for guidance when they have questions.

There are a number of important considerations for the special representative regarding club operational duties when organizing Rotary e-clubs. Refer to appendix 7 for details.



Find the New Club Application on page 27.

#### Determining Locality and Name of Club

Each Rotary club exists in a locality, the area in which it will provide service. A locality is composed of one or more communities. The locality of the club must be written in the club's application for membership in RI and its constitution.

A club name identifies the club with its locality and the community it serves. The name should be easily identifiable on a map of the area. When a locality has more than one club, each additional club uses the locality's name plus some other designation to distinguish it from the other club(s). The use of a meal in the name (breakfast, lunch, supper, dinner) is strongly discouraged, as it implies that the club's sole purpose is to share a meal. The RI general secretary reviews the New Club Application to determine whether a name is appropriate.

Consult chapter 6 for some examples of proper Rotary club names, or direct any questions about appropriate club names to your CDS representative.



A glossary of common Rotary terms can be found in appendix 3. Many of these terms will be unfamiliar to charter club members and may require further explanation.



Use the sample agendas found on page 47 as a guideline for topics and issues to address at the organizing club's initial weekly meetings.



Provide the provisional club with a complete *Club Officers' Kit* (225). Purchase from [shop.rotary.org](http://shop.rotary.org) or download individual items from [www.rotary.org](http://www.rotary.org).

## Determining Meeting Location and Time

The new club's meeting location and time should be considered carefully, taking into consideration factors such as charter members' ages, professional and personal responsibilities, where they live and work, and how far they would have to travel in order to attend the meeting. For example, if most members are parents of young children and prefer spending their evenings at home, it is advisable to set the meeting time no later than 17:00. Club members who live in a suburban community but work in the city might choose their meeting location depending on the meeting time. The option of holding a breakfast meeting or having no meal should be considered in order to reduce club members' expenses.

## Conducting Weekly Meetings

Several issues need to be addressed during the first weekly meetings of the organizing club such as the explanation of membership requirements, the purpose and content of constitutional documents, and the election of officers. For sample agendas, see appendix 4.

## Electing Provisional Club Officers and Calling First Club Assembly

Electing officers capable of leadership is essential to the new club's success. Officers and directors should be elected for their qualities of vision, leadership, and administrative ability and be prepared to devote the time necessary to carry on the work of the club. The special representative and the sponsor club should assist the new club in electing its officers.

The new board should meet immediately following its election. The board elects the following officers: president, president-elect (usually the same person if the club is chartered in the second half of the Rotary year — January through June), vice president (more than one may be elected), secretary, treasurer, and sergeant-at-arms. The special representative presides at this meeting.

Once the board has been elected and committees appointed, the club president should call the first club assembly. The assembly serves as a planning session at which committee chairs can discuss the duties of their committees. This meeting offers a valuable opportunity for club leaders to further develop their plans and integrate them into the club's overall program.

## Deciding the Club Committee Structure

The board of the new club should develop a committee structure to meet its goals and objectives. Articles 9 and 10 of the Recommended Rotary Club Bylaws outline the structure and duties of the five recommended committees (club administration, public relations, membership, service projects, and The Rotary Foundation). Additional committees should be appointed annually as needed.

The responsibilities of each committee will be outlined in the club bylaws. Committees should meet immediately after they have been formed so that members can discuss their responsibilities and plan activities. As soon as initial projects have been determined, each committee should report its plans to the club's board. Except where special authority is given by the board, no committee should take action until a report has been made to the board and approved. The chairs of these committees are responsible for regular meetings and reporting all committee activities to the board.

As special representative, encourage the chairs of the sponsoring club's committees to meet with their counterparts in the new club. Invite committee members of the organizing club to attend a committee meeting of the sponsor club.





Download *Be a Vibrant Club: Your Club Leadership Plan* (245) at [www.rotary.org/downloadlibrary](http://www.rotary.org/downloadlibrary), or order printed copies from [shop.rotary.org](http://shop.rotary.org) for the new club officers and committee members.

### Using *Be a Vibrant Club: Your Club Leadership Plan*

Clubs should use the guide, *Be a Vibrant Club: Your Club Leadership Plan*, to implement some of the recommended best practices for increasing member involvement, community awareness, and club effectiveness. Members are encouraged to annually review these practices to ensure they continue to meet the club's goals and reflect the club's identity. The special representative should seek the aid of district leaders, particularly assistant governors, for helping clubs implement and review practices as needed throughout the year.

#### Action steps:

- ☐ Confirm that the charter club members have unanimously agreed on a time and place for their weekly meeting.
- ☐ Oversee the adoption of the Standard Rotary Club Constitution and a set of club bylaws.
- ☐ Encourage the charter club to strive for reaching at least 25 charter members by a certain date.
- ☐ Promote the development of a diverse membership that mirrors the professional make-up of the community.
- ☐ Oversee the scheduling of the weekly meetings and the development of the agendas, in concert with the sponsor club and charter club members (see appendix 4 for sample agendas).
- ☐ Supervise the election of the provisional club officers and a board of directors.
- ☐ Ensure the acting treasurer is collecting any fees and dues from prospective members.
- ☐ Preside over the first board meeting, and make sure that committees are formed.
- ☐ Explain the purpose of the club assembly to the charter club members, and assist the club in calling the first club assembly.
- ☐ Provide guidance to the charter club, in coordination with the sponsor club, in running successful committee meetings.
- ☐ Invite the organizing club's committees to attend meetings of the sponsoring club's committees so that they can better understand how an experienced committee works.
- ☐ Encourage the charter club to understand the flexibility it has to implement operations, and consider the best practices in *Be a Vibrant Club: Your Club Leadership Plan*.
- ☐ Assist the charter club with the timely completion of the New Club Application, and forward the charter fee to the district governor.
- ☐ Ensure that the charter club has met all required government regulations that exist in a given locality.



Clubs in the United States, American Samoa, Guam, Northern Marianas, Puerto Rico, and the U.S. Virgin Islands must apply for an employer identification number (EIN). Use IRS Form SS-4 for requesting an EIN for your club (see [www.irs.gov/formspubs](http://www.irs.gov/formspubs) for instructions). Once you receive the EIN, notify your CDS representative, so that the number can be included in your club's permanent records at RI World Headquarters.





*Effective Public Relations: A Guide for Clubs* (257) is an excellent resource for provisional clubs that need ideas for promoting their activities to the local community.



*Communities in Action/Community Assessment Tools* (605) contains suggestions for clubs to develop effective service projects. Clubs engaged in diverse, well-run service projects are attractive to potential members. The special representative and sponsor club should communicate the availability of RI resources to the provisional club.



Consult the *RI Visual Identity Guide* (547) for policy on using the Rotary emblem.

## WORKING WITH THE PROVISIONAL CLUB

When a club is ready to meet weekly and has elected club officers, the district governor can grant it provisional club status. The club will remain a provisional club until it receives its charter. With this provisional status, the club meetings can serve as a meeting make-up to visiting Rotarians.

The sponsor club continues to mentor the provisional club during this important stage of new club development. As special representative, you should oversee this mentoring activity and maintain contact with the sponsor club (if it is not your own club) periodically. Also maintain good communication with the provisional club, and be sure to ask if their mentorship needs are being met. Some possible areas of mentorship during this time include:

- Developing a club website
- Working on a club communication plan, which includes a club newsletter. Encourage the sponsor club's newsletter editor to meet with the provisional club's future editor to provide ideas about newsletter production, topics, and resources from the district and RI. E-newsletters are highly recommended because they are economical and easy to distribute.
- Continuing membership development and prospective member education. Don't forget to include the district trainer if you have specific training needs that he or she can accommodate.
- Sharing ideas for program agendas for at least the first eight weekly meetings

### Action steps:

- ☐ Encourage the provisional club to develop a club website to create a public presence in the community and attract charter members.
- ☐ Emphasize the importance of diversification across classification. Club members with varying areas of professional expertise are beneficial to developing a well-rounded club.
- ☐ If the club doesn't have enough members to complete its charter paperwork, suggest holding a prospective member education program on a weekday evening. Assist in publicizing the event, and encourage the sponsor club members and the charter club members to actively invite community members to attend. For program suggestions, see *New Member Orientation: A How-to Guide for Clubs* (414).
- ☐ Consult with the district governor on the status of the New Club Application so that the proposed timeline can be updated and adjusted, as necessary. Help the provisional club with the paperwork and encourage the club to submit it to the district governor when they are ready. Remind the club to collect the charter fee from new members.
- ☐ Contact the district governor to report the status of the new club's development.

## ORGANIZING THE CHARTER PRESENTATION MEETING

After the RI Board approves its application, the provisional club becomes a member club of RI, and the district governor is notified. The special representative should consult with the district governor about making program preparations for the charter presentation meeting as soon as the New Club Application has been submitted. However, a date should not be set until the governor is notified that the application has been approved.



Use the sample charter presentation meeting checklist (page 49) and the new club news release (page 51) as you work with the new club officers to organize and publicize the charter presentation event.

The new club officers, with the assistance of the special representative, organize and plan the event. See chapter 5 for complete details. A sample charter presentation meeting checklist and a sample news release for the event are also included in appendixes 4 and 5. Customize these resources, as necessary.

#### **Action steps:**

- ☐ Once the club's application is officially approved, work with the new club, sponsor club, and district governor to select a date for the charter presentation meeting. Always allow a minimum of four weeks after the submission of paperwork to RI for the processing of the New Club Application. Do not set a date for the presentation meeting until you receive notification from the district governor that the application has been approved.
- ☐ Ask the officers of the new club what kind of assistance they want or need in planning the formal event.
- ☐ Request that members of the sponsor club assist the new club in preparations.
- ☐ Create public awareness about the new club by contacting the local media and distributing a press release. A sample press release is included in appendix 6.
- ☐ Update the district governor on the status of the event.



Distribute copies of *How to Propose a New Member* (254) during one of the initial meetings of the new club. Remind the new club that they should continue to seek new members.

### **SUPPORTING NEW ROTARY CLUBS**

The special representative's responsibilities continue until the president, secretary, and chairs of the principal committees of the new club have a working understanding of their duties. The special representative is strongly encouraged to follow up regularly with the new club during the year after the chartering, and the district governor-elect is strongly encouraged to reappoint the special representative for that purpose.

The sponsor club's duties continue for at least a full year *after* the charter is granted, but it is recommended that the sponsor club continues to mentor the new club during its first few formative years. The special representative should also continue his or her relationship with the new club and the sponsor club for several years.

The special representative and/or sponsor club may contribute to the success of the new club by

- Helping the new Rotarians become thoroughly informed about Rotary by attending weekly meetings
- Encouraging other clubs in the district and district committee members to assist with new member education
- Encouraging club members to attend the district conference and RI Convention
- Advising the club on which members should attend district training seminars
- Being available to give the club direction when they begin planning their first service project
- Educating club members about The Rotary Foundation
- Assisting the new club in planning its programs during its first year
- Planning joint fundraising activities between the sponsor club and new club
- Encouraging sponsor club members to attend regular meetings of the new club
- Encouraging the new club's members to make up at a nearby club (use Club Locator at [www.rotary.org](http://www.rotary.org) to find meeting times).



Distribute copies of *The Rotary Foundation Quick Reference Guide* (219) during a club meeting. New clubs should consider the many opportunities for involvement in The Rotary Foundation's programs. Order free copies at [shop.rotary.org](http://shop.rotary.org).



Encourage the new club to develop a club vision by completing the activity outlined in the *Strategic Planning Guide* (downloadable from the RI website).



Conduct Rotary business online, including SAR payment, at [www.rotary.org/memberaccess](http://www.rotary.org/memberaccess).



Find the Confirmation of Former Rotary Club Membership and Good Financial Standing form at [www.rotary.org/en/membershipresources](http://www.rotary.org/en/membershipresources).

After six months, check the club's status in the following areas and offer guidance where appropriate:

- Are the club's weekly meetings dynamic and well-planned?
- Are the committees making progress on their goals related to membership growth, community service, The Rotary Foundation, and club leadership development?
- Is the club board of directors holding effective monthly meetings?

## SUBMITTING FIRST SEMIANNUAL REPORT AND DUES

The sponsor club officers should guide the new club president and secretary through the process of submitting the semiannual report (SAR) and dues for the first time. Make sure they understand that new clubs are liable for payment of dues for the semiannual period following the period in which they are admitted, except that

- ☐ Clubs admitted 16 May-30 June are excused from submitting a 1 July SAR and dues
- ☐ Clubs admitted 16 November-31 December are excused from submitting a 1 January SAR and dues

Also mentor the new club officers to ensure the club is in compliance with all local and national tax laws.

## Meeting Past Due Financial Obligations

Advise the new club about the procedure for collection of club past due financial obligations. Explain that a club with unpaid financial obligations in excess of US\$250 will receive a reminder notice from the Secretariat 90 days (three months) after the due date. Following that, a club with unpaid financial obligations in excess of \$250 will be terminated 180 days (six months) after the due date. For additional procedures on reinstatement and reorganization of terminated clubs, see Rotary Code of Policies 9.020.2-8.

## Maintaining Complete Records

The sponsor club's secretary can help the new club's secretary establish a system for permanent record keeping to ensure that club records are complete from the beginning. Information about the organization of the new club and the charter membership list are important historical documents. Ensure that the new secretary has a copy of the club's constitution (with articles 2 and 3 properly completed) and the club's bylaws. These documents should be kept as a permanent club record. Help the secretary set up a simple system to record attendance and significant anecdotes that should be a part of the club's history. Ensure the club has a copy of the *Manual of Procedure* (035).

Membership changes and terminations should be carefully recorded and reported through Member Access at [www.rotary.org/memberaccess](http://www.rotary.org/memberaccess). (Member Access is highly preferred, but changes may also be recorded using the Membership Data Form, which is available as a download from the RI website. The Membership Data Form is also included in the *Club Secretary's Manual*, part of the *Club Officers' Kit*.) This information should also be shared with the district. A member of the sponsor club should help the secretary in preparing a report of the club's monthly attendance and submitting it to the district governor by the 15th of the following month.

The club secretary should also collect the Confirmation of Former Club Membership and Good Financial Standing form, available at [www.rotary.org](http://www.rotary.org), from any Rotary club in which prospective new members held previous membership. Notify the club board if a form is returned with unsatisfactory payment history.



Encourage clubs to review all of the resources offered in the *RI Catalog* (019). The catalog can be accessed online at [shop.rotary.org](http://shop.rotary.org). Many publications are also available as free downloads at [www.rotary.org/downloadlibrary](http://www.rotary.org/downloadlibrary).

## Using Rotary Resources

RI produces a variety of publications, videos, and online resources. A packet of printed materials is sent to the club secretary following the club's admission to RI. Inform the club that these materials should be used by the club's board to carry out their duties, by all members to continue their Rotary education, and by the membership committee and club members to educate prospective members.

All new club membership committees should be encouraged to use the *Membership Development Resource Guide* (417) and its online supplement, *Club Assessment Tools*. Regular assessment is essential to developing and maintaining effective and successful club operations, especially for new clubs. *New Member Orientation: A How-to Guide for Clubs* (414) and *How to Propose a New Member* (254) are two additional membership publications that new club membership committees should utilize. The *Strategic Planning Guide*, an online-only publication available on the RI website, helps clubs develop a long-range vision and serves as a framework for establishing goals. New clubs would benefit from completing this activity.

*Communities in Action/Community Assessment Tools* (605) is also an important resource for new clubs since developing effective service projects is vital to a club's success. New clubs should also be well-versed in the many exciting programs and services of The Rotary Foundation. *The Rotary Foundation Quick Reference Guide* (219) provides a concise overview of the many opportunities for supporting The Rotary Foundation.

*Rotary Basics Online* ([www.rotary.org/rotarybasics](http://www.rotary.org/rotarybasics)) is an interactive, e-learning module that offers prospective, new, and current members a comprehensive, online Rotary learning experience.

### Action steps:

- ☐ Ensure that the club president and secretary are educated about the benefits of using Member Access. Review the e-learning module on Member Access with the club president and secretary.
- ☐ Delegate training responsibilities to the sponsor club president, secretary, and treasurer. Each should meet with their counterpart from the new club to review their administrative duties.
- ☐ Ensure that the new club has been trained on submitting semiannual reports, and mentor the new club officers about any local and national tax law compliance issues.
- ☐ Contact the new club at least once a month during the first year to answer any questions and provide guidance, as necessary.
- ☐ Check in with the sponsor club at least once a month during the first year to see how the club is continuing to support the new club. Ask the sponsor club to help out in any areas the new club indicates it needs help.
- ☐ Ask the new club if it needs any guidance on projects.
- ☐ Suggest that the new club use the assessments in *Club Assessment Tools*, particularly the Membership Satisfaction Questionnaire. Surveying club members several times during the first few years helps the club determine what the club members want out of their membership.

- ☐ Assist the new club with brainstorming ideas for dynamic weekly programs.
- ☐ Inquire if the club has any questions or concerns about collecting dues or any other administrative tasks.
- ☐ Track the club's recruitment and retention efforts, and advise the club accordingly.
- ☐ Communicate routinely with the district governor and district governor-elect on the new club's progress.



DVD resources from RI educate new members, and new clubs, about what Rotarians around the world are accomplishing. The *Membership Video Set* (427), *Rotary's US\$200 Million Challenge DVD* (985), *Rotary and the International Community: Connecting the Local to the Global* (266-DVD), *This Is Rotary* (449), and *RVM: The Rotarian Video Magazine* inspire new Rotarians to get involved in community and international service projects.



# 4

## Completing Required Forms for RI

The following documents are essential to apply for membership in RI:

- New Club Survey
- Sponsor Club Form (if applicable)
- New Club Application

All forms are available as writeable PDF forms at [www.rotary.org/downloadlibrary](http://www.rotary.org/downloadlibrary).

The district governor should review each of these documents carefully to verify the accuracy of all information and approve each form. After signing the forms, forward them to the district's RI Club and District Support (CDS) representative. A copy should be kept for the club's files.

Please note that all contact information that is required on the forms is kept in the RI database and used only for contacting the Rotarian. It is highly recommended that members' e-mail addresses be provided.

Appendix 3 contains definitions of many of the terms on these forms. Make sure to discuss Rotary terminology with the charter and sponsor club officers to better facilitate the completion of all forms. If you have any questions, contact your CDS representative. You can also find the answers to many frequently asked questions in chapter 6.







# New Club Survey

## MEMBERSHIP IN RI

To be completed by the surveyor (as designated by the district governor) and sent to the governor for approval and signature

Proposed name of new club: \_\_\_\_\_

District: \_\_\_\_\_

Community: \_\_\_\_\_

State/province/prefecture: \_\_\_\_\_

Country: \_\_\_\_\_

Please describe the various aspects of the community in each of the categories below.

RELEVANT DEMOGRAPHIC INFORMATION (*such as population or principal industries and businesses*):

NUMBER OF ROTARY CLUBS IN THE SAME COMMUNITY (*if none, the nearest Rotary club*):

LIST THE NAMES AND OCCUPATIONS OF PEOPLE WHO MIGHT FORM THE BASIS OF A NEW CLUB:  
(*The number of people with the same classification on a charter list is limited. For more information see RI Constitution 5.2(b).*)

CURRENT/FORMER ROTARIANS WHO WILL BE CHARTER MEMBERS (*list names and clubs*):

**Surveyor's evaluation:** I verify that I have visited this community and found it suitable for the formation of a new Rotary club.

\_\_\_\_\_  
Name

\_\_\_\_\_  
Date

## NEW CLUB SURVEY PAGE 2

To be completed by the district governor

### Sponsor Club

Sponsoring Rotary club(s): \_\_\_\_\_

☐ New club will not have a sponsor club.

### Special Representative

Title (Mr., Ms., Mrs., Dr., Rev., etc.): \_\_\_\_\_ Suffix (Jr., Sr., III, etc.): \_\_\_\_\_

Family name: \_\_\_\_\_

First name: \_\_\_\_\_ Middle name: \_\_\_\_\_

Member, Rotary Club of \_\_\_\_\_  
(official name of club, including country)

E-mail: \_\_\_\_\_

Mailing address (if post office box, please provide an alternate address for courier delivery):

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_ Postal code: \_\_\_\_\_

### District Governor's Decision

This community ☐ is ☐ is not capable of supporting a Rotary club.

\_\_\_\_\_  
District Governor's Signature

\_\_\_\_\_  
Date

The district governor should forward the original to the Club and District Support representative and keep a copy for the club's files.



# Sponsor Club Form

## MEMBERSHIP IN RI

Sponsor club name: Rotary Club of \_\_\_\_\_

Sponsor club number: \_\_\_\_\_

Our membership voted on \_\_\_\_\_ to sponsor a new Rotary club,  
date

likely to be known as the Rotary Club of \_\_\_\_\_  
(community, state/province/prefecture, country/geographical area)

- ☐ Our club agrees to be the sponsor club. We will assist in its formation, help with the charter presentation ceremony, and work closely with the new club for at least one year.
- ☐ Our club currently has \_\_\_\_\_ active members.  
(A sponsor club must have a minimum of 20 members.)

\_\_\_\_\_  
Sponsor Club President's Signature Date

\_\_\_\_\_  
Sponsor Club Secretary's Signature Date





# New Club Application

## MEMBERSHIP IN RI

*All information requested on this form is required. Incomplete forms result in processing delays.*

### Standard Rotary Club Constitution

This section corresponds with the articles of the Standard Rotary Club Constitution.

#### Article 2: Name

The name of this organization shall be (check one)

☐ Rotary club

☐ Rotary e-club

\_\_\_\_\_  
(complete name, including community, state/province/prefecture, country/geographical area)

The club name should be easily identifiable on a map, so that someone unfamiliar with the area can determine the club's general location.

#### Article 3: Locality of the Club

The locality of this club is \_\_\_\_\_ and surrounding area.  
(community name)

*A locality is a geographic description of the area it serves.*

*For e-clubs, the locality is considered by the RI Board to be worldwide.*

*Please see pages 36 and 37 for examples of appropriate club names and localities.*

#### Article 10, Section 4: Officer Names

President \_\_\_\_\_

Secretary \_\_\_\_\_

President-elect \_\_\_\_\_

Treasurer \_\_\_\_\_

Vice president(s) \_\_\_\_\_

Sergeant-at-arms \_\_\_\_\_

#### Article 14: Rotary Magazines (check one)

☐ Everyone subscribes to *The Rotarian*.

☐ Some or all of our members subscribe to the following Rotary regional magazine certified by RI:

\_\_\_\_\_, and everyone subscribes to either it or *The Rotarian*.

(Please ensure that all charter members indicate their magazine choice on the charter member list.)

☐ Club is in a country excused by the RI Board from subscribing to a magazine.

## NEW CLUB APPLICATION PAGE 2

### Weekly Meeting

Day of week \_\_\_\_\_ Time (include official website posting time for Rotary e-clubs) \_\_\_\_\_

Name of meeting place \_\_\_\_\_

Address \_\_\_\_\_

Address \_\_\_\_\_

Postal code \_\_\_\_\_

Website URL for online meetings (Rotary e-clubs only) \_\_\_\_\_

### RI Charter Fee

Number of charter members \_\_\_\_\_ x US\$15 = \_\_\_\_\_

Currency in which the charter fee was paid and amount: \_\_\_\_\_

*Charter fee is being paid via:*

☐ Check\*    ☐ Money order    ☐ Fiscal agent

☐ Bank transfer to an RI account outside USA

☐ Other: \_\_\_\_\_

*\*Non-U.S. clubs paying by check must have their check drafted through a U.S. bank.  
(Please attach check or proof of payment.)*

### New Club Contact Information

If the club has a preferred mailing address, such as a post office box, please provide that information below:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Phone (include country/city/area codes): \_\_\_\_\_

Fax (include country/city/area codes): \_\_\_\_\_

E-mail: \_\_\_\_\_

Website: \_\_\_\_\_

☐ Our club prefers to receive the club bill (SAR) via e-mail.

## NEW CLUB APPLICATION PAGE 3

### Certification

*Please read the following items carefully. Your signature certifies that this new club meets the qualifications set forth in RI's constitutional documents.*

The provisional Rotary Club of \_\_\_\_\_  
(complete name, including community, state/province/prefecture, country/geographical area)

hereby applies for membership in RI and confirms that the club

1. Will abide by the Constitution and Bylaws of RI
2. Has adopted the Standard Rotary Club Constitution prescribed by RI as the club's constitution and will abide by its provisions
3. Will always have bylaws that are in harmony with the constitutional documents of RI, including the Standard Rotary Club Constitution
4. Will not become a member of, or assume obligations of membership in, any organization other than RI
5. Shall maintain the obligations of a member club in RI and be subject to the jurisdiction of RI

The signatures of the president and secretary of this provisional club attest to this club being organized in accordance with the constitutional documents and policies of RI and that the information in this application is accurate.

\_\_\_\_\_  
Club President's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Club Secretary's Signature

\_\_\_\_\_  
Date

As governor of the district, I certify that this application meets the requirements in the constitutional documents of RI and the policies of the RI Board of Directors, and I endorse this club's application for admission to the association.

- ☐ All members of the provisional Rotary club have participated in an appropriate orientation and education program under the guidance of district leaders and members of the sponsoring Rotary club.
- ☐ The club has set for its members an appropriate admission fee and an appropriate annual fee that allows the club to cover its financial obligations.
- ☐ The club has a well-balanced membership in compliance with the guidelines set forth in Article 5, Section 2 of the RI Constitution, which states in part: "Each club shall have a well-balanced membership in which no one business, profession, or type of community service predominates. The club shall not elect a person to active membership from a classification if the club already has five or more members from that classification, unless the club has more than 50 members, in which case the club may elect a person to active membership in a classification so long as it will not result in the classification making up more than 10 percent of the club's active membership."
- ☐ All current or former Rotarians joining this new club have provided written proof from their current or previous clubs confirming that all debts have been paid.
- ☐ (For Rotary e-clubs only) Counting this Rotary e-club, the number of total Rotary e-clubs in the district does not exceed two.

\_\_\_\_\_  
District Governor's Signature

\_\_\_\_\_  
Date

### Charter List

Attached is a list of active charter members conforming to the policies established by the RI Board of Directors.

## CHARTER LIST

Copy this page to provide information for each member (minimum of 25 charter members).

Please type or print clearly

Title (Mr., Ms., Mrs., Dr., Rev., etc.): \_\_\_\_\_ Suffix (Jr., Sr., III, etc.): \_\_\_\_\_

Family name: \_\_\_\_\_

First name: \_\_\_\_\_ Middle name: \_\_\_\_\_

Gender: ☐ Male ☐ Female

Preferred language: \_\_\_\_\_

Former/current Rotarian: ☐ No ☐ Yes

If yes, RI membership ID number: \_\_\_\_\_

Name of former/current club: \_\_\_\_\_

Former/current firm: \_\_\_\_\_

Position: \_\_\_\_\_

Phone (including country/city/area codes)

Fax (including country/city/area codes)

Residence: \_\_\_\_\_ Residence: \_\_\_\_\_

Business: \_\_\_\_\_ Business: \_\_\_\_\_

Mobile: \_\_\_\_\_

E-mail: \_\_\_\_\_

Mailing address\* (check one):

☐ Residence ☐ Business ☐ Other

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\*If post office box, please provide an alternate address for courier delivery.

Alternate address: (complete only if mailing address is a P.O. Box)

☐ Residence ☐ Business ☐ Other

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Magazine: ☐ *The Rotarian* ☐ Rotary regional magazine



# 5

## Charter Presentation

The charter presentation meeting, at which the new club is officially welcomed into Rotary, should be a memorable event in the history of a Rotary club. The meeting should include an inspirational Rotary address and the presentation of the charter by the district governor.

The charter for a new club, signed by the RI president and bearing the official seal, is sent to the district governor, usually within four weeks of the club's admission to membership. The district governor also signs the charter. After it has been presented to the club, the charter should be carefully preserved and, if possible, framed and displayed in a prominent place in the club's headquarters, meeting place, or secretary's office.

### SETTING THE DATE AND TIME

The club's charter date, marking its membership in RI, is the date the club is admitted by the RI Board of Directors, not the date of the charter presentation or club organization. The new club shouldn't wait until the formal presentation of the charter to begin its activities. As soon as the Board admits it to membership, the club may begin the regular functions of a Rotary club. *Under no circumstances, however, should the date for the charter presentation meeting be set until the application for membership has been approved*, in case of unexpected delays obtaining approval.

After the district governor assures that the application has been approved and the club is operating effectively, the governor and special representative should work with the new club officers to set the date and time for the charter presentation. In selecting the date, allow sufficient time for careful planning of the program and hospitality and securing districtwide publicity. Avoid conflicts with other districtwide events so that members of other clubs can participate.

### PREPARING THE DISTRICT GOVERNOR'S REMARKS

The district governor usually makes the presentation with appropriate remarks that may include:

- Rotary's meaning to its individual members and to the community
- A review of what the club has agreed to by joining RI
- The benefits of Rotary fellowship in the district and around the world
- The worldwide impact of The Rotary Foundation's programs
- Rotary's commitment to eradicate polio
- The importance of steady membership growth and development

After opening remarks, the district governor may present the charter.

### PLANNING THE CHARTER PRESENTATION MEETING

The new club officers, with the assistance of the special representative, organize and plan the event, focusing on the following details. For assistance in planning the event, use the charter presentation meeting checklist in appendix 5.

### *Location*

Once the date has been set, select the location for the meeting. Selection of the meeting place depends on the facilities available and anticipated attendance. It is up to the club to decide the most appropriate means of recognizing the charter, including where the event will be held, and for e-clubs, if the meeting will be held in person or online.

### *Estimate of Expenses*

The price of the ticket should be reasonable but appropriate to cover all meeting expenses. The charter club should play a significant role in the planning of the event, and as such, should have the final say as to the degree of formality and/or scale of event.

In preparing the budget, factor in the estimated attendance and the actual cost per meal as well as costs associated with printing programs, dinner tickets, place cards, invitations, and publicity materials, and other expenses, such as favors, program expenses, and special guests.

### *Invitations to Clubs in the District*

When sending invitations, allow sufficient time to permit clubs to announce the event during at least two regular meetings. The invitation should include the date, time, price, and location of the event as well as the name of the speaker, a contact person for the response, and the reservation deadline. It is suggested that Rotarians pay for reservations in advance.

### *Publicity*

Send news releases to the local news media to help the community gain an understanding of Rotary and learn about the new club. For a sample news release, see appendix 6.

Send complimentary tickets to the publishers or editors of local newspapers and the directors of television and radio stations to encourage media coverage of the event.

### *Guests of Honor*

To introduce the club to the community it was organized to serve, invitations should also be extended to local dignitaries and all past and present RI officers residing in the district or nearby districts. It is up to the new club to decide which, if any, honored guests should be provided with complimentary tickets.

### *Welcoming Committee*

The sponsor club frequently serves as the welcoming committee, personally greeting the guests as they arrive.

### *Registration*

Provide sufficient registration facilities. To facilitate introductions, name badges should be prepared for everyone in attendance.

### *Seating*

Prepare seating arrangements in advance. The district governor, special representative, sponsor club president, president and secretary of the new club, guests of honor, and all their spouses usually sit in a prominent location. Refer to the *Manual of Procedure* for Rotary protocol.

### *Program*

The entire program should be designed to foster fellowship and inspire the new club's members.

Due consideration should be given to selecting the Rotarian who will give the principal address. Choose a Rotarian who is known to deliver an inspirational address.

Customarily, either the district governor's special representative or the president of the sponsor club calls the meeting to order and continues as master of ceremonies. That person makes certain each participant knows what to do and what the time limits are.

For a suggested program outline, see appendix 5.

### *Commemorative Program*

As a memento and historical document of the charter presentation, a commemorative program of the meeting may be provided. It doesn't need to be elaborate or expensive. The commemorative program usually contains:

- Name of new club
- Time and place of the charter presentation meeting
- Program, including names of speakers
- Entertainment details
- Names of officers and charter members
- Name of sponsor club(s) and special representative

### *Gifts for the New Club*

Frequently, the sponsor and other clubs present the new club with gifts, such as a speaker's stand, a Rotary flag, Rotary lapel pins, or a bell and gavel. Sponsor clubs may also offer to cover the cost of the new club charter fees. The district governor or the special representative should arrange for such presentations and advise the master of ceremonies before the meeting which clubs will make presentations.



# 6

## Frequently Asked Questions

This list of frequently asked questions can help you anticipate and answer questions that charter members and sponsor clubs may have about organizing a new club.

### **Is a New Club Survey necessary?**

Yes, the RI Board requires one *before* members are recruited for the new club.

### **Does a new club have to have a sponsor club?**

No, but the RI Board strongly encourages sponsor clubs because they can significantly reduce the high termination rate of new clubs by helping to establish growing membership, relevant service projects, and enjoyable fellowship opportunities for the new club. A new club may have one or more sponsor clubs, but at least one of the sponsor clubs should be in close physical proximity to the new club.

### **Does the special representative have to belong to the sponsor club?**

No. In many instances, the special representative's club acts as a sponsor club, but that is not required. The governor may select any Rotarian to serve as special representative.

### **Is there a minimum or maximum number for a charter list?**

The minimum number is 25; there is no maximum.

### **What are the qualifications for membership?**

Qualified potential members fall into one of these categories:

- ☐ Currently working in professional, proprietary, executive, or managerial positions or retired from such positions
- ☐ Community leaders who have demonstrated a commitment to service through personal involvement in community affairs
- ☐ Rotary Foundation alumni, as defined by the RI Board

They must also

- ☐ Be able to meet the club's weekly attendance and community project participation requirements
- ☐ Live or work within the club's area
- ☐ Fit into a classification that is not overrepresented in your club (exception: Rotary Foundation alumni)

**Are there any restrictions on classifications?**

Yes. A club can have up to five members or 10 percent of the active members, whichever is higher, in any one related field. For example, a charter list with 25 members would be limited to 5 members with the same classification. On the other hand, a charter list with 60 members can have up to 6 members (10 percent) who share the same classification.

Review the classification worksheet completed by the special representative to ensure that the club has a balanced and diversified list of business, professional, and community club-charter members.

RI does not maintain a classification list. The reason there is no central list is that every business community may have professions or businesses that are unique to that local area. In order to create appropriate classifications, consult your local phone directory, chamber of commerce or other business listing, or other sources to determine appropriate classifications for potential new members.

**How do I locate my Club and District Support representative?**

Find the CDS representative for your area at [www.rotary.org/cds](http://www.rotary.org/cds).

**What are some examples of proper Rotary club names?**

**Multiple Communities**

Three communities	Altena-Werdohl-Plettenberg
Part of a county	Alpharetta/North Fulton County

**Additional Clubs**

City neighborhood	Chania (Crete)
Year chartered	Piatra Neamt 2005
Civic nickname	Carlsbad (Cavern City)
Serving a shore area	Tampa Upper Bay

**Meeting Times**

Morning	Prospect Sunrise, Kawaguchi Morning
Noon	Sedona Midday, Chatsworth-High Noon
Evening	Karachi Sunset Millennium, Leesburg (Sunset), Winter Park-Evening

For Rotary e-club naming guidelines, refer to appendix 7.

If the name of the proposed club is the same as a terminated club, please state the reasons why the same name is being proposed.

**Can a member of a current Rotary club be included on the charter list of a new club?**

Yes. The member should let their current club know his or her intent, so that the member's resignation is completed by the date that the provisional club is admitted to membership. Upon resignation, the member should also request a Confirmation of Former Rotary Club Membership and Good Financial Standing form be signed by the club secretary and club president of the club from which the member is resigning. Submit the completed form to the charter club president or secretary. A Rotarian cannot be a member of two Rotary clubs at the same time, unless one of the memberships is honorary.

**Can a new club be permanently restricted to its meeting time or place?**

No. Once a club is admitted to membership in RI, it has the same rights as any other Rotary club to decide its own meeting day, time, and place.

**Are there any requirements for descriptions of locality?**

Yes, a written description is required. Please see page 12 for more information.

**How can a new club avoid problems with its application?**

When a partial charter list is ready, send it to your CDS representative for review and comment. Call your CDS representative anytime you have questions. Find contact information for your CDS representative at [www.rotary.org/cds](http://www.rotary.org/cds).

**Is it just a formality for the RI Board to approve the admission of a Rotary club?**

No. The application documents are thoroughly scrutinized to ensure that they comply with RI constitutional documents and Board policies. Some provisional clubs have not become Rotary clubs because the Board did not approve their applications.

**Is signing the document the district governor's only role in organizing a new club?**

No. The district governor must first approve the New Club Survey and then assign a special representative. The governor also must attest that the completed application has been reviewed and approved. Depending on the circumstances of each new club formation, the district governor may either be highly involved in the process or turn over the majority of the responsibility to the special representative.

**Can any person organize a new Rotary club?**

No. Individuals interested in forming a new club must work with the district governor and the designated special representative.

**How is a new club organized in a non-Rotary country or geographical area?**

The RI Board of Directors has determined that Rotarians interested in pursuing extension to non-Rotary countries and geographical areas must work through the appropriate RI Extension of Rotary Committee. These regionally based committees have been charged by the RI Board to facilitate the development of Rotary in these new areas and to assist Rotary clubs seeking to conduct service projects in them. Working under the guidance of an extension committee ensures that Rotary presents a focused and coordinated approach to local and regional governments. If you are interested in extension into a non-Rotary country or geographical area, contact the appropriate committee chair or your CDS representative.







# Appendix 1: District Governor's Planning Worksheet for Organizing a New Rotary Club

Action	Target Date	Date Accomplished
Special representative appointed		
Sponsor Club Form received from sponsor club		
New Club Survey completed, signed, and submitted to RI (along with Sponsor Club Form)		
Potential charter members recruited		
Classification Worksheet verified		
Locality, club name, meeting location, meeting time determined		
Club fees and dues, weekly meetings, election of club officers established and conducted		
Provisional club status declared (by the district governor)		

Action	Target Date	Date Accomplished
Standard Rotary Club Constitution, club bylaws, committee structure adopted by the charter members		
New Club Application submitted by charter club to district governor for approval		
New Club Application submitted to RI by district governor		
New Rotary club admitted to RI membership by RI Board		
District governor receives notification of approval from RI		
Charter presentation date identified		
Charter presented to new club		



## Appendix 2: Classification Worksheet

This worksheet is to be completed by the special representative and verified by the district governor.

**This document is retained in the club and district files, but it is not sent to RI.**

**Member Name**

**Classification**

1.

2.

3.

4.

5.

6.

7.

8.

9.

10.

11.

12.

13.

14.

15.

16.

17.

18.

19.

20.

21.

22.

23.

24.

25.

### Classification Balance Verification

- ☐ I certify that the charter members of this club have an even distribution of classifications that comply with the provisions of Article 8 of the Standard Rotary Club Constitution.

\_\_\_\_\_  
Special Representative's Signature

\_\_\_\_\_  
Date

- ☐ Verified by \_\_\_\_\_

\_\_\_\_\_  
District Governor's Signature

\_\_\_\_\_  
Date





## Appendix 3: Glossary of Rotary Club Terms

### **admission (charter) fee**

New clubs pay an admission fee of US\$15 per charter member to RI. The admission fee is established to underwrite the cost to RI of chartering and serving the new club.

### **board of directors, club**

Governing body of a Rotary club, constituted according to club bylaws. The president, president-elect, and vice president are always members of the board. The treasurer, secretary, and sergeant-at-arms are optionally included on the board at the discretion of the club. (Standard Rotary Club Constitution Article 10.4)

### **charter list**

A list of all active charter members that is submitted as part of the New Club Application. All new club applications require the submission of detailed information about each active charter member. Only active membership is requested (the honorary membership list is maintained by the club). *Charter lists are subject to random verification by RI.* RI will contact the district governor if a charter list is inaccurate. There are ramifications if the district governor approves an inaccurate list.

### **charter member**

A founding member of a Rotary club, elected to membership before the club is admitted to membership in RI.

### **charter officers**

President, president-elect, vice president (more than one is allowed), secretary, treasurer, and sergeant-at-arms. (Standard Rotary Club Constitution Article 10.4)

### **classification**

A separate and distinct business or professional service rendered to the community. Each club determines the classifications that exist in its community, and each active club member is assigned a classification, which correlates to the member's principal and recognized business or professional activity or that of the member's firm, company, or institution.

### **classification survey**

An annual survey completed by a Rotary club in which the classifications of its members are compared to the professional makeup of the local community. Intended to ensure club diversification across professions, it is reviewed periodically. Find this club survey in *Club Assessment Tools*, which can be downloaded from the RI website.

### **classification worksheet**

A resource to be completed by the governor's special representative and verified by the governor detailing new club member classifications. The district and club keep this information in their files. See the Classification Worksheet included as appendix 2.

### **club assembly**

Meeting of all club members, including the club's officers, directors, and committee chairs, held to confer on the club's program and activities or to induct new members.

### **Code of Policies, Rotary**

Document containing all of the general and permanent policies of the RI Board of Directors. The code supplements the RI constitutional documents. Find the most recent version at [www.rotary.org](http://www.rotary.org) (keyword search: "Rotary Code of Policies").

### **diversity**

RI recognizes the value of diversity within individual clubs. Rotary encourages clubs to assess those in their communities who are eligible for membership, under existing membership rules, and to endeavor to include an appropriate range of individuals in their clubs. A club that reflects its business and professional community is a club with the key to its future.

### **dues and fees**

The club admission fee and annual dues that every active member pays to the club. Amounts are determined by the club.

### **E-club**

A Rotary e-club is one that meets online but is otherwise similar to other Rotary clubs. A 2010 Council on Legislation enactment recognized Rotary e-clubs as part of Rotary International beginning 1 July 2010.

### ***Manual of Procedure***

Publication created to help club and district leaders understand Rotary and the policies and procedures most relevant to their services; issued every three years after each Council on Legislation. Also contains the RI constitutional documents.

### **Member Access**

Members-only area of [www.rotary.org](http://www.rotary.org) where Rotarians can contribute to The Rotary Foundation, manage their RI e-mail subscriptions, register for meetings, and access member benefits. Club and district officers have access to additional records and reports. For example, club presidents and club secretaries can update club membership data, view and print the semiannual report, and pay per capita dues. Member Access is RI's preferred method for updating data.

## **Membership Data Form**

Alternative to making membership updates *automatically* through Member Access. RI form that the club secretary uses to report new members, terminations of membership, and changes in addresses and classifications to the general secretary. Downloadable from [www.rotary.org](http://www.rotary.org). Also included in the *Club Secretary's Manual*, part of the *Club Officers' Kit*.

## **per capita dues**

The membership fees that each club pays to RI semiannually (on 1 July and 1 January) for each active member of the club.

## **provisional club**

The status granted an organizing group of charter club members by the district governor, after the club meets weekly and has elected club officers who subscribe to the Standard Rotary Club Constitution. This designation entitles the provisional club to issue make-up meetings to visiting Rotarians.

## **Recommended Rotary Club Bylaws**

Provisions for governing a Rotary club. Recommended bylaws are provided by the RI Board, but clubs may change club bylaws to meet individual club conditions so long as any changes are in harmony with the constitutional documents. The Recommended Rotary Club Bylaws are available at [www.rotary.org](http://www.rotary.org) and from RI Club and District Support representatives.

## **regional Rotary Foundation coordinator (RRFC)**

Rotarian appointed by the RI president and president-elect, in consultation with The Rotary Foundation Trustees. There are 41 RRFCs serving as Foundation resources for designated geographical areas. A current list is available at [www.rotary.org](http://www.rotary.org).

## **Rotary coordinator (RC)**

Rotarian who serves as a resource on Rotary International for districts and clubs. The 41 RCs are appointed by the RI president to cover designated geographical areas. A current list is available at [www.rotary.org/en/rotarycoordinators](http://www.rotary.org/en/rotarycoordinators).

## **semiannual report**

Report that each club submits to RI on 1 July and 1 January, certifying to the RI Board the number of members on these dates. The report may be completed online by the club president, secretary, or treasurer (through Member Access) or sent to the general secretary on forms provided by RI. The club's per capita dues to RI are based on these reports.

## **special representative**

Rotarian appointed by the district governor to represent the governor in organizing a new club. RI requires current contact information for special representatives in the event of questions or problems with new club applications.

**sponsor club**

Rotary club that assumes responsibility for assisting in the organization of a new club and in guiding the club's early development as a member of RI. The sponsor club serves as a mentoring club to a new club, both before and after the new club has been chartered. The special representative's club often acts as the sponsor club, but this is not a requirement. If another club has been selected to sponsor the new club, the governor will inform the special representative. More than one club may cosponsor a new club.

**Standard Rotary Club Constitution**

Governing provisions that must be adopted by each club. These provisions are consistent with the RI Constitution and the RI Bylaws and can only be amended by a Council on Legislation. Each new club is admitted to membership in RI after adopting the Standard Rotary Club Constitution. (RI Bylaws 2.030.)





## Appendix 4: Suggested Weekly Meeting Agendas for Organizing Clubs

Traditionally, the special representative works with the new club president to organize and preside at the weekly meetings of an organizing club. Use the suggested agendas below as a guideline as you work with the organizing members to plan weekly meetings during the first few months.

### FIRST MONTH OF MEETINGS

- Ask attendees to introduce themselves and state their business or profession. Recognize former Rotarians and those who plan to be members of the new club.
- Explain the various types of service that Rotarians have the opportunity to become involved in.
- Provide an overview of The Rotary Foundation and its programs. Distribute copies of *The Rotary Foundation Quick Reference Guide* (219). Order free copies from [shop.rotary.org](http://shop.rotary.org).
- Explain the five Avenues of Service, the elements of an effective club, and other guiding principles identifying Rotary membership.
- Distribute copies of *This Is Rotary* (001) and *Rotary Basics* (595). Encourage attendees to navigate through *Rotary Basics* online ([www.rotary.org/rotarybasics](http://www.rotary.org/rotarybasics)), an interactive media presentation, to learn more about Rotary.
- Invite the district governor to speak about the roles of the district and the district governor.
- Explain the 50 percent attendance requirement, and explain where members can make-up meetings, either locally or through an e-club (find more information at [www.rotary.org](http://www.rotary.org)).
- Explain the importance of a diverse membership and the members' responsibility to bring in new members.
- Stress membership requirements:

Qualified potential members are either

- ☐ Currently working in professional, proprietary, executive, or managerial positions or retired from such positions
- ☐ Community leaders who have demonstrated a commitment to service through personal involvement in community affairs
- ☐ Rotary Foundation alumni, as defined by the RI Board

They must also

- ☐ Be able to meet the club's weekly attendance and community project participation requirements
- ☐ Live or work within the club's area
- ☐ Fit into a classification that is not overrepresented in your club (exception: Foundation alumni)

- Explain club, district, and RI financial obligations.
- Call for any payments of the US\$15 charter fee that haven't been received.
- Show segments from the *Membership Video Set* (427) or *This Is Rotary* (449).
- Announce and explain the schedule of subsequent meetings.

## SECOND MONTH OF MEETINGS

- Confirm the day, time, and place of the weekly meetings.
- Hold a discussion about club goals and objectives, including the types of community or international service the potential members are interested in getting involved in. Consider scheduling a time for the club to complete the *Strategic Planning Guide*. This activity is available for download from the RI website and helps clubs develop a long-range vision.
- Provide an overview of Rotary's involvement in the efforts to eradicate polio. Give a status update on Rotary's US\$200 Million Challenge. Distribute *End Polio Now* pins (988) to the club members (available from shop.rotary.org).
- Review the classification principle, and consider completing the classification survey from *Club Assessment Tools* (downloadable from the RI website). This activity is designed for full club participation and encourages club members to recruit community professionals from classifications that are not yet represented in the club.
- If the organizing club has the required minimum of 25 charter members, announce that at the next meeting, the club's constitution and bylaws will be adopted and the officers and board of directors will be elected. All members should come prepared to vote.

## THIRD MONTH OF MEETINGS

As soon as 25 or more qualified people have agreed to become charter members and pay the charter fee, the organizing club should elect officers, adopt the Standard Rotary Club Constitution and a set of bylaws, collect the charter fee from each charter member, and complete the New Club Application. The club may or may not be ready; tailor the meeting accordingly.

- Invite a dynamic program alumnus or alumna as a guest speaker.
- Define the club's locality and choose a name that identifies it with that area. (Keep in mind that the name is not official until approved by the RI Board; do not have items imprinted with the club name until you have received approval from RI.)
- Adopt the Standard Rotary Club Constitution.
- Select the week and month for the annual meeting of officers, which must be held between 1 July and 31 December.
- Select the day and week for the monthly board meetings.
- Determine the club admission fee and annual membership dues. The amount must cover RI and district dues.
- Develop a club committee structure that supports club goals and objectives. Consider the committees indicated in *Be a Vibrant Club: Your Club Leadership Plan*.
- Adopt or revise club bylaws that are consistent with the RI Constitution and Bylaws and the Standard Rotary Club Constitution (available for download at [www.rotary.org](http://www.rotary.org)).
- Elect officers.



## Appendix 5: Charter Presentation Meeting Checklist

- ☐ Date selected and confirmed
- ☐ Meeting place selected and confirmed
- ☐ Budget approved by board
  - Price per ticket multiplied by number of estimated attendees
  - Estimated expenditures
  - Estimated income
- ☐ Rotary clubs invited (with detailed record of which have accepted)
- ☐ Sponsor club members invited (with detailed record of who has accepted)
- ☐ Special representative invited
- ☐ District governor invited
- ☐ Program items planned
  - Reception/fellowship hour
  - Call to order
  - Welcome
  - Dinner
  - Introduction of head table guests
  - Introduction of visiting Rotarians by club
  - Address about Rotary
  - Presentation of charter
  - Acceptance of charter and address by new club's president
  - Pinning of the charter members
  - Introduction of new club's members and their spouses
  - Presentation of gifts by other clubs
  - Expression of thanks by district governor or the special representative
- ☐ Agenda, including time allotments for each part of program, given to all participants

❑ Commemorative program

- Design
- Printing
- Advance copy to each participant

❑ Publicity

- News release to all newspapers and radio and television stations
- Complimentary dinner tickets to news media

❑ Special invitations

- Local dignitaries
- All past and present RI officers in the district
- District governor-elect and district governor-nominee
- Representatives of other service clubs

❑ Logistics

- Meal selection and service
- Registration
- Welcoming committee
- Table decorations
- Seating arrangements
- RI literature
- Care of special guests
- Public address system
- Coat room
- Facilities for late arrivals
- Lighting
- Ventilation
- Parking
- Props for program
- Rotary pins

**Other details**



## Appendix 6: Sample News Release

Use this sample news release as a model for your own, following the instructions given in brackets and editing it to fit local circumstances. Give the release a title that will interest non-Rotarians, for instance, "Community members gather together to improve [your town/city name]." Include information specific to your district, and keep the release under one page. For additional tips on writing and using news releases, go to [www.rotary.org](http://www.rotary.org) and click on Members, Running a club, Public relations.

One Rotary Center | 1560 Sherman Avenue | Evanston, IL 60201-3698 USA

Contact: [Insert name] [Insert e-mail address] [Insert fax and phone numbers] [www.rotary.org](http://www.rotary.org)

### NEWS RELEASE

[Insert headline]

[Insert CITY, DATE] — The world's first civic service organization, Rotary International, is expanding into [insert city name]. Local members received a charter on [insert date] to join RI's global association of 33,000 Rotary clubs in more than 200 countries and geographical areas.

The Rotary Club/Rotary E-Club of [insert club name] plans to [insert local initiatives or projects planned for club's first year]. The club joins Rotary's global network of volunteers in enhancing their communities and promoting international goodwill through club projects, scholarships, cultural exchanges, and grants for development and humanitarian projects.

[Insert a quote from a local Rotary leader, for example: "Rotary was founded over 100 years ago in Chicago, and now its influence can be felt around the globe. Rotary's achievements provide an inspiring record of men and women of all races, religions, nationalities, and creeds who have made significant contributions to create a more peaceful world."]

The Rotary Foundation, the philanthropic arm of the association, awards millions of dollars each year to worthy projects carried out by clubs and districts working locally and in international partnerships. The Rotary Foundation also sponsors the world's largest privately funded international scholarships program.

Since 1985, eradicating polio worldwide has been Rotary's top philanthropic goal. Rotary's US\$200 Million Challenge is The Rotary Foundation's response to \$355 million in challenge grants from the Bill & Melinda Gates Foundation for polio eradication efforts. These grants represent a tremendous validation of the approach and success of Rotary's PolioPlus program.

For information on joining the new club or finding ways to work with Rotary in your community, contact [insert name and contact information of club secretary or president].

Founded in Chicago in 1905, Rotary is an organization of business, professional, and community leaders united worldwide to provide humanitarian service and help build goodwill and peace in the world. Rotary clubs meet weekly and are nonpolitical, nonreligious, and open to all cultures and creeds. For more information about Rotary, visit [www.rotary.org](http://www.rotary.org).

###

Clubs should add to the news release:

- A quote from the new president on his or her plans and hopes for the year
- Brief information on the club's community and international projects
- A photo of the new club engaged in a service activity, including the names of those pictured and a description of the event
- Meeting location, day, and time along with club contact information

For Rotary e-clubs, include the link to your club's website and offer a brief explanation of what a Rotary e-club is. Use resources including appendix 7 and "What You Need to Know about Rotary E-Clubs" as needed.



## Appendix 7: Addendum on Organizing E-Clubs

A 2010 Council on Legislation enactment recognized Rotary e-clubs as part of Rotary International, following a six-year pilot project.

The majority of responsibilities and procedures of setting up Rotary clubs, as detailed in *Organizing New Clubs* (808), also apply to e-clubs; however, district governors and special representatives should review the special considerations for e-clubs outlined in this addendum.

District governors and special representatives are encouraged to use this addendum along with “What You Need to Know about Rotary E-Clubs” (available at [www.rotary.org](http://www.rotary.org)) as a starting point in understanding their role in organizing e-clubs. If you have questions or comments, please contact your RI Club and District Support representative (find contact information at [www.rotary.org/cds](http://www.rotary.org/cds)).

### ROLES AND RESPONSIBILITIES OF THE DISTRICT GOVERNOR

The organization of new e-clubs is ultimately the responsibility of the district governor. (RI Bylaws 15.090.) The governor leads a team of individuals who should all be familiar with the technological requirements and skill set needed to organize an e-club.

During the preliminary stages, the district governor must first verify that there are no more than two Rotary e-clubs in the district. (RI Bylaws 2.010.1., 15.010.) To do this, governors can check the club name in Member Access and work with predecessors and successors to maintain a list of any e-clubs in the district.

#### Understanding e-club requirements

The district governor should fully understand the unique requirements of e-clubs, as outlined in “What You Need to Know about Rotary E-Clubs,” in order to delegate duties to the special representative appropriately. The governor is also encouraged to review and discuss these requirements with the special representative, district extension committee, sponsor club, and charter members early in the e-club planning stage to ensure that the entire organizing team fully understands them.

#### Appointing the district extension committee

The governor oversees both the appointment of a district extension committee to organize all new Rotary clubs, including e-clubs and the development of the committee’s New Club Survey. As part of their overall responsibilities related to e-clubs, committee members should also thoroughly understand the technological and other considerations for e-clubs highlighted in “What You Need to Know about Rotary E-Clubs.” At this stage, the governor is encouraged to discuss the following considerations with the committee:

- Would a Rotary e-club be a welcome addition to the district?
- Is there enough interest in the e-club to support a vibrant and active club?
- What impact would the formation of the e-club have on any existing clubs?
- What type of Rotary e-club does the district want to form? Will the club meet exclusively online, or will some club meetings be held in person? If so, where and when?

## Selecting a special representative

The special representative is the primary point person for recruiting and working with charter members, so it is critical that this Rotarian understands the basics of Rotary e-clubs and can communicate technical and other requirements to the sponsor club and potential members. It is recommended that the special representative come from the new e-club's sponsor Rotary club.

As with other Rotary clubs, Rotary e-clubs need a strong support system from other clubs in the district to be successful, especially during formation.

## Governor's role in recruitment

Recruiting members for e-clubs is distinct from recruiting for other Rotary clubs in many ways. The governor should work with the special representative on recruitment (for details, see "Recruiting members" in the following roles and responsibilities section for special representatives).

Once members are recruited, the e-club should begin meeting online. In order to grant provisional club status as outlined in *Organizing New Clubs*, the governor should monitor the e-club's progress by attending online and any in-person club meetings. The governor is also responsible for working with the special representative to ensure that the Rotary e-club name, club bylaws and committee structure, and charter members meet the expectations outlined in *Organizing New Clubs*.

## Converting an existing Rotary club into a Rotary e-club

When an existing Rotary club wants to become a Rotary e-club, the district governor should verify that the e-club complies with all requirements including the maximum of two clubs per district. If approved, the club would only need to modify its name and locality (see page 56). Specific forms for petitioning the RI Board for approval of the changes can be found at [www.rotary.org](http://www.rotary.org).

Rotary's constitutional provisions require that any changes to a club's name and/or locality must be submitted to the RI Board for approval. See the Standard Rotary Club Constitution, Article 19, Section 2, for details.

## ROLES AND RESPONSIBILITIES OF THE SPECIAL REPRESENTATIVE

The special representative appointed by the district governor should be well-versed in the technological requirements for e-clubs as outlined in "What You Need to Know about Rotary E-Clubs." While the district governor oversees the general organization process, the special representative is more involved in details, particularly member recruitment and day-to-day e-club operations.

### Recruiting members

During the member recruitment stage, the special representative works closely with the district governor to find members with strong skill sets related to communicating electronically with a community, as well as having at least a few members versed in establishing and maintaining an interactive club website.

**Rotary experience.** As with Rotary clubs, e-clubs can establish a strong foundation by drawing members with Rotary experience. The pilot project showed that successful e-clubs generally had a larger percentage of previous or current Rotarians as members, including:

- Rotarians who have served as webmaster or otherwise contributed to Rotary club websites
- Rotarians who have previously made up a meeting at an e-club site



Other potential members may include:

- Professionals who have expressed an interest in Rotary but travel frequently
- Young professionals who are interested in Rotary's principles but either cannot or prefer not to meet in person weekly

**Technical skills.** The special representative should also ensure that at least one member (and preferably more than one) is able to operate all aspects of the e-club's website, including building and/or maintaining a site that protects member data and allows for online financial transactions. See "What You Need to Know about Rotary E-Clubs" for more details.

### **Evaluating prospective members**

The special representative may not have an opportunity to interview all prospective members face-to-face to evaluate their qualifications for membership. You may need to work with the district governor to evaluate the prospective member's qualifications by other means.

When face-to-face meetings with prospective members aren't possible, prospective members can be interviewed on the telephone or by using a video chat service such as Google chat or Skype. The signed membership application form should include a verification of his/her home mailing address. Clubs should be careful during the screening process to avoid individuals applying for membership under false pretenses.

Although an e-club belongs to a specific district, its locality can be local, regional, national, or worldwide. As the club grows, members will increasingly represent a wider geographical area. Members may come from any country where Rotary currently exists, but the RI Board has stated that members cannot be based in any country or geographical area where Rotary does not have a current presence.

Although there are no required procedures for vetting new e-club members, the RI Board did learn some best practices during the pilot project that preceded the admission of e-clubs into Rotary International. When a prospective member of an e-club was previously a Rotarian, the e-club requested confirmation through a vote taken at a regular meeting of the prospective member's previous club that the applicant was a Rotarian in good standing on termination of his/her membership in that club. When the prospective member of an e-club was not previously a Rotarian, the e-club requested confirmation from two Rotarians whose names were provided by the prospective member in the applicant's community, that the applicant was a person of good standing.

It is recommended that clubs use the Confirmation of Former Rotary Club Membership and Good Financial Standing form, available at [www.rotary.org](http://www.rotary.org), to certify that a potential e-club member who was a former Rotarian resigned in good financial standing and owes no debt to his/her former club. Refer to the Standard Rotary Club Constitution for details.

### **Advising members on operational duties**

The special representative is responsible for helping e-club members with operational duties, including determining the locality and name of the e-club, its meeting location, and time. Special representatives also help ensure that the club meets technical requirements (e.g., a fully functional website that includes password-protected areas, members know how to access and use the site).

**Rotary e-club name and URL.** RI recommends that the host district be included in the name and URL of the e-club's website, for example:

Rotary E-Club of District 3310, Singapore  
www.rotaryclub3310.org

Special representatives should ensure that the e-club's name and locality fit the following format on the New Club Application (found in *Organizing New Clubs*):

Club name: Rotary E-Club of \_\_\_\_\_

Club locality: The locality of this e-club is (worldwide) and can be found on the Worldwide Web at www.\_\_\_\_\_

**Weekly meeting time.** Club members can meet online 24 hours a day; however, the RI Board defines e-club meeting times as the time when weekly discussion materials are posted live on the Rotary e-club site. Work with the charter members to determine the posting time, and include this information on the New Club Application.

**Language.** A Rotary e-club usually chooses a primary language in which it will operate and post on its website. However, this is not required in the application documents.

**Currency.** Rotary e-clubs must establish a secure system for processing online financial transactions. PayPal is one of many companies that offer these services. The e-club should operate in the currency of its home district, even if its membership represents other countries. Check with an attorney or tax consultant for any national or local laws you may need to observe based on the district's country of origin.

**Elections and first assembly.** RI recommends that the special representative work with the e-club to ensure that its board includes as many current or former Rotarians as possible. The club officers should possess the Internet skills and website experience necessary to organize an effective Rotary e-club. Committees related to the technical aspects of the club's website may also be appropriate.

The special representative should work with the governor and charter club members to determine who has administrative rights for the club's site. For example, will the club secretary and club president administer data? Who will check and process incoming e-mail from the account posted on the site? Does the club treasurer know how to process online financial transactions?

**Club committee structure.** The special representative should encourage sponsoring club committees to meet with the e-club both in person and online in order to test the effectiveness of participation and the e-club's structure. Recommend that committee meetings be held in a password-protected area of the website. Also, ensure that the e-club's committee structure is reflected in the club bylaws and constitution and work with club members to revise those documents, if necessary.

**Club Leadership Plan.** The special representative should work with the district governor to ensure that the e-club reviews the best practices outlined in *Be a Vibrant Club: Your Club Leadership Plan* and adapts them to an online community. For example, how can the e-club use the online forum to provide leadership training for continuity of leadership? How can the leadership of the club create succession plans for particular aspects of e-club administration, such as training new members to use or maintain the site?

## Working with the provisional club

Once the club has fulfilled all of the necessary requirements outlined in this document and *Organizing New Clubs*, the district governor can grant the e-club provisional status. At that point, Rotary club members from other clubs will be able to make up meetings at the e-club site. The Rotary e-club charter members are encouraged to prepare for these visits by developing content and e-club programs for visiting Rotarians.

Part of the club communication plan should include developing a news release about the e-club. Refer to *Organizing New Clubs* for a sample news releases on new clubs.

## Supporting new Rotary e-clubs

The special representative plays an active role in the early stages of the e-club, until all club officers fully understanding their roles and the e-club can function on its own weekly. You might discuss questions such as:

- How will new members get the education and training they need on Rotary's policies and traditions?
- How will club members get information about The Rotary Foundation?
- How will the Rotary e-club interact and cooperate with other Rotary clubs on service projects or fundraisers?

As with other Rotary clubs, Rotary e-club members can participate in president-elect training seminars (PETS) and district assemblies; however, physical attendance at these meetings is required.

RI encourages the special representative to ensure that the e-club members are actively participating in Rotary.

**Service projects.** Service Above Self is the foundation of all Rotary clubs, including Rotary e-clubs. E-club members are responsible for organizing their own service projects or joining with other Rotary clubs on projects. As special representative, work with e-club members to determine how to best apply their skills, talents, and interests to community service projects. Consider asking:

- Will service projects be based in the home district, or will they be international?
- How will members use the website to organize and plan service projects?
- What types of service projects are e-club members capable of doing in person?

### *Project Examples*

A Rotary e-club meets online with a Rotary club to plan a project to clean up a park. A majority of e-club members later gather at the park to carry out the project. Members who live in different communities participate with a local Rotary club in their respective areas.

To mark Rotary's anniversary, each e-club member commits to performing a service project with a club in their local area and then discussing it in the following week's online meeting as part of the program.

**Youth programs.** Because e-clubs serve no particular community and may have members from various Rotary countries or geographical areas, district governors and special representatives should be aware of special considerations for e-clubs interested in participating in New Generations programs (Interact, Rotaract, RYLA, Youth Exchange). RI encourages you to work with district governors and e-club charter members to make sure e-clubs meet the following conditions:

- All youth protection policies and guidelines must be followed.
- Any online activities involving minors must be for specific legitimate purposes, be password protected, made available only to a limited number or group of vetted individuals, and carefully monitored.
- Sponsors of Interact and Rotaract clubs must provide adequate in-person support to ensure the Interact club or Rotaract club is sustainable.
- For RYLA, the district RYLA committee must determine the level and nature of involvement by e-club members.
- Youth Exchange activities must be operated within the district boundaries, and the district Youth Exchange committee must determine the level and nature of involvement by e-club members.

RI urges e-clubs to partner with Rotary clubs in their district. By working together, e-clubs can more easily find qualified individuals, do the necessary assessments and interviews, and meet in person to maintain regular contact and provide leadership and mentoring to youth.



# Publication Evaluation Form

RI wants to provide effective resources to Rotarians and Rotary clubs and districts. Your feedback about this guide will help us to improve future editions. Thank you.

1. What is your role in the organization of a new club?
2. How did the district governor and special representative use this guide?
3. What did you find most useful?
4. What did you find least useful?
5. What information would you add to this guide?
6. Any additional comments or suggestions?

## Contact Information (optional)

Date: \_\_\_\_\_

Name: \_\_\_\_\_

Rotary club: \_\_\_\_\_ District: \_\_\_\_\_

Address: \_\_\_\_\_

City, state/province, postal code: \_\_\_\_\_

Country: \_\_\_\_\_

E-mail: \_\_\_\_\_ Phone: \_\_\_\_\_

Please send to:

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This is the 2011 edition of *Organizing New Clubs: A Guide for District Governors and Special Representatives* (808). The information in this publication is based on the Standard Rotary Club Constitution, the Recommended Rotary Club Bylaws, the Constitution of Rotary International, the Bylaws of Rotary International, and the Rotary Code of Policies. Changes to these documents, by the 2013 Council on Legislation or the RI Board, override policy as stated in this publication.



# Plan your club's future using these guides

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Strategic Planning Guide  
Planning Guide for Effective Rotary Clubs**

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