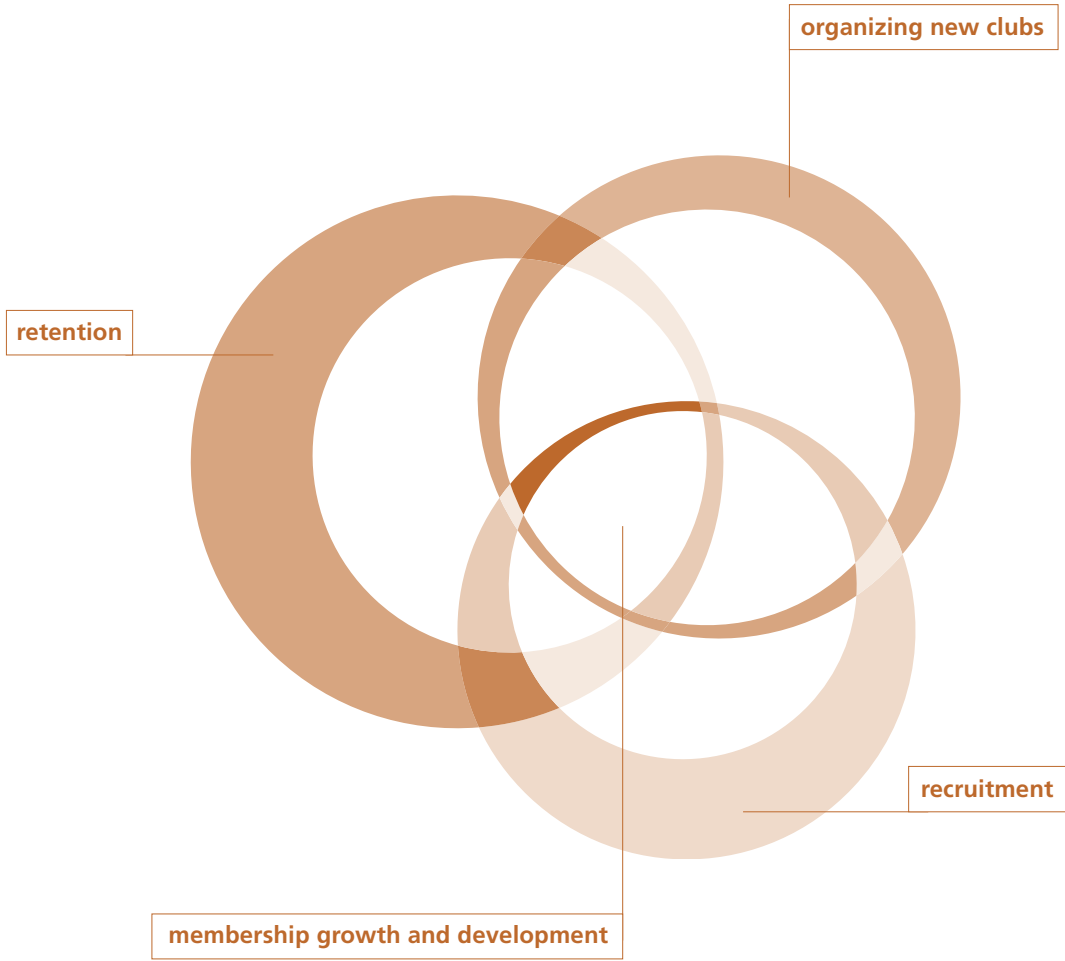


# Organizing New Clubs

A Guide for District Governors and Special Representatives



Rotary International®



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# 1 Introduction

For Rotary International to continue its vital humanitarian work and expand its service to communities at home and abroad, its membership base must continue to increase. More members means more knowledge, more talent, and more energy to carry out ambitious projects that will touch the lives of hundreds of thousands of people. Each new Rotarian brings a range of personal and professional resources and skills that can greatly strengthen Rotary and the ability of its clubs to successfully serve their communities and the world.

All Rotarians share the responsibility of ensuring membership growth and development through three key functions:

- Retaining existing members
- Recruiting new members
- Organizing new Rotary clubs

Because these three elements are equally important to maintaining membership growth and development, each needs to be emphasized at the club and district levels to ensure that Rotary clubs continue to be strong, relevant, and effective. Effective Rotary clubs are able to

- Sustain and increase their membership base
- Implement successful projects that address the needs of their community and communities in other countries
- Support The Rotary Foundation through both program participation and financial contributions
- Develop leaders capable of serving in Rotary beyond the club level

In some cases, Rotary clubs may find it impossible to continue increasing their membership. For example, meeting facilities may not be able to accommodate a larger group, or the meeting time may be inconvenient for new members. In some cases, prospective members are precluded from joining clubs because of their gender or age. In these situations, district governors are encouraged to assist in the organization of new Rotary clubs. To accommodate the ethnic composition of a community, it is also possible to organize a new Rotary club that would hold its meetings in a language other than the dominant language in that district.

In recent years, charter members of new Rotary clubs have been a vital element of Rotary's membership growth. Those interested in organizing a new Rotary club should contact their district governor and Club and District Administration (CDA) representative of the Rotary International office serving their area.

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. This guide provides required forms and information about organizing a new Rotary club, as well as suggested materials and action steps. Organizing a new club is a very dynamic and fluid process. 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.

## 2 Process for Organizing a New Club

Organizing a new club is a dynamic and fluid process, involving the efforts of various Rotarians as well as potential charter members. The following steps are part of that process (steps required by Rotary International are shown in bold):

1. **Organization of New Club Survey** is signed by the district governor and submitted to Rotary International.
2. The district governor appoints and identifies **the special representative** to work with the charter group in organizing the club.
3. **New Club Sponsor Form** is signed by the club president and secretary of each club agreeing to act as a sponsor club, and submitted to RI. Although not required, a sponsor club is strongly recommended.
4. Potential **charter members are recruited** for the new Rotary club.
5. Charter members determine the **club name and locality** and the **meeting location and time**.
6. Charter members establish **fees and dues**, conduct **weekly meetings**, and elect club **board and officers**.
7. District governor grants **provisional club** status to the club, which entitles it to issue make-up meetings to visiting Rotarians.
8. Charter members adopt the **Standard Rotary Club Constitution, club bylaws**, and club **committee structure**.
9. **New Club Application Form**, which includes the list of **charter members**, is signed by the club president and secretary and submitted with the **charter fee** to the district governor. The governor and special representative sign the form, which is then submitted to RI.
10. **RI Board of Directors approves the application** and admits the new Rotary club to membership in RI. The date the club is admitted by the RI Board of Directors is the club's charter date, marking its membership in RI.
11. **Charter is presented** to new Rotary club by the district governor or the special representative.

For a handy worksheet to help you plan and track your progress, see appendix 1.

# 3 Roles and Responsibilities

Organizing a new Rotary club is a time-consuming activity, one that requires careful supervision by the district governor and the cooperation of many people.

## District Governor

The organization of new clubs is the responsibility of the district governor (RI Bylaws 15.090), under the general supervision of the RI Board. Organizing new clubs can be one of the principal achievements of a district governor, and it may also be an important part of setting district goals for the year.

As district governor, you have the following responsibilities when organizing a new club:

- Appointing members to serve on the district extension committee, and supervising their activities
- Approving an official Organization of New Club Survey of the locality determined to be a potential area for a new club, and, if favorable, sending a completed copy to the district's RI office
- Appointing a special representative to assist with the process of organizing a new club\*
- Reviewing and verifying the accuracy of information on the New Club Application Form, then signing and sending it to the district's RI office for RI Board approval
- Presenting the charter to the new Rotary club

*\*Because the duties of the special representative continue for one year after the club is chartered, consultation with the district governor-elect is recommended.*

The district governor is strongly encouraged to maintain contact with the new club after it is chartered and be 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.

## Special Representative

The district governor appoints a well-informed Rotarian from a nearby club, preferably the sponsor club, as special representative for organizing the 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.

Once a new club is chartered, the special representative is strongly encouraged to follow up regularly with the new club during the year following the chartering, and the district governor-elect is strongly encouraged to reappoint the special representative for that purpose.

As the district governor's special representative, you have these general responsibilities:

- Convening a planning meeting with members of the sponsor club or organizing group, after the Organization of New Club Survey is approved but *before* actual organizational work begins
- Working with the organizing group and the sponsor club, if applicable, to divide responsibilities for
  - Recruiting prospective charter members who qualify for membership per RI Board and constitutional documents
  - Completing documents for admission of the new club
  - Assisting the new club during its formative first year following chartering

For more information on the special representative's activities, see appendix 2.

### **Sponsor Club**

Although a sponsor club is not required, it's strongly recommended. New clubs may have more than one sponsor. 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

The sponsor club has these responsibilities when organizing a new Rotary club:

- 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 at least two years after its admission to membership in RI

*Note:* All Rotarians involved in organizing a new club should be aware that any decisions made on the new club's behalf are tentative and not binding on its members.

For more information on sponsor club activities, see chapter 10, "Best Practices of Sponsor Clubs," and appendix 3.

### **Charter Members**

Charter members are the founding members of a club. They are elected to membership before the club is admitted to RI.

Charter members have these responsibilities:

- Determining locality
- 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

### **District Extension Committee**

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 who have been active and successful in establishing new clubs.

Under the direction of the district governor, the district extension committee develops and implements a plan to organize new Rotary clubs within the district. Preference for the position of chair should be given to past district governors or district governors-nominee. The committee has the following responsibilities:

- Identifying communities without Rotary clubs that are capable of chartering a new club
- Identifying communities where additional Rotary clubs could be established without negatively affecting any existing club or detracting from the service any existing club provides to the community
- Assisting in organizing and establishing new clubs as assigned by the district governor

### **Regional RI Membership Coordinator and RI Membership Zone Coordinator**

The regional RI membership coordinator (RRIMC) or RI membership zone coordinator (RIMZC) assigned to the district is available to the district governor, district extension committee, and special representative as a resource for consultation and advice during the chartering process. These Rotarians can provide assistance, guidance, and support in the process of organizing new clubs. (Rotary Code of Policies 26.060.3)

# 4 Preliminary Steps for Organizing a New Club

Before beginning the process of organizing a new club, familiarize yourself with the basic terminology used and the required preliminary actions.

## **Identifying Prospective Localities**

You should ensure that the locality has enough qualified businesses and professionals to provide a minimum of 40 classifications that can maintain an additional club of at least 20 active members under Rotary's classification system. (For more information and a sample list of classifications, see "Using the Classification Principle" below and appendix 4.)

### *Non-Rotary countries*

All extension efforts to countries that do not currently have Rotary clubs are coordinated through the Extension of Rotary Committee, per RI Board policy. This committee has been charged by the RI Board to facilitate the development of Rotary in these countries and assist Rotary clubs seeking to conduct service projects in them. Working under the guidance of the committee ensures that Rotary presents a focused and coordinated approach to local and regional governments. If you're interested in extension into a non-Rotary country, contact the Extension of Rotary Committee chair or your CDA representative.

## **Conducting an Organization of New Club Survey**

If organizing a new Rotary club is possible, the district governor should initiate an Organization of New Club Survey. The surveyor should visit the prospective locality to determine whether it can support a new club. This is especially important in localities with fewer than 5,000 inhabitants. Before any potential members are recruited for a new club, the governor must verify that the survey and the sponsorship form, if applicable, are completed and submit them to RI. If the club isn't organized during the year, the survey should be passed on to the incoming governor.

## **Recruiting Charter Members**

In preparing a list of prospective charter members, consider the following resources:

- 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
- Qualified Rotary alumni or other people who benefited from an RI or Rotary Foundation program
- Qualified former Rotaractors

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

As you prepare the list, give careful consideration to diversity. International understanding and goodwill begin with the application of the same principles within your club. Assess whether your list represents the ethnic, age, and religious diversity of the community, as well as a balance of men and women. With a diverse membership base, the club will be more representative of the community and better able to identify and meet local service needs.

### *Limitations on membership*

Rotary International strongly encourages the formation of well-balanced Rotary clubs in order to properly reflect the diverse business and professional life of the community. No club may, by provisions in its constitution or otherwise, limit membership in the club on the basis of gender, race, color, creed, or national origin or impose any condition of membership not specifically prescribed by the RI Constitution or Bylaws.

### **Gender**

All Rotary clubs are encouraged to have membership that includes both men and women. Governors are encouraged to promote dual-gender membership in all clubs in their districts. Where single-gender membership clubs remain, governors should promote the establishment of new dual-gender clubs in the locality of the existing single-gender clubs.

### **Using the Classification Principle**

In organizing a Rotary club, it's important to provide for a diversified membership. An organizing club should therefore fill only one distinctive classification within each group of related classifications, although circumstances may require the filling of two or more of these distinct classifications. In any case, no more than 10 percent of the total number of charter members may hold a given classification.

The RI constitutional documents include specific guidelines on using Rotary's classification principle:

"Each Rotary club shall have a well-balanced membership in which no one business or profession predominates." (RI Constitution Article 5.2.b)

"Each member shall be classified in accordance with the member's business or profession. The classification shall be that which describes the principal and recognized activity of the firm, company, or institution with which the member is connected or that which describes the member's principal and recognized business or professional activity.

"If the circumstances warrant, the Board may correct or adjust the classification of any member. Notice of a proposed correction or adjustment shall be provided to the member, and the member shall be allowed a hearing thereon." (Standard Rotary Club Constitution Article 7.1)

A club with fewer than 50 members can have as many as 5 members with the same classification. A club with 50 or more members can have up to 10 percent of the club's active membership with the same classification. (SRCC Article 7.2)

"Members who are retired shall not be included in the total number of members in a classification. The classification of a transferring or former member of a club shall not preclude election to active membership even if the election results in club membership temporarily exceeding the above limitations. If a member changes classification, the club may continue the member's membership under the new classification notwithstanding these limitations." (SRCC Article 7.2)

For additional information on classifications, see appendix 4.

# 5 Working with Charter Members

The district governor or the special representative should work with charter members to organize a new club and continue working with the club after it is admitted as a member of Rotary International. Throughout the process, the RRIMC is available to answer questions and offer advice and suggestions.

Help charter members with the work of organizing the club, particularly with the following issues. (For required support once the club is chartered, see chapter 8).

## **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. The typical description for a locality is "the city or town of (city/town name) and the surrounding area." Please include a geographical description of the club's boundaries. Consult with your CDA representative for alternate wording formats.

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 RI general secretary uses the New Club Application Form to determine whether a name is appropriate. Additional stipulations on club names can be found in the instructions for completing the club's membership application.

## **Determining Meeting Location and Time**

The new club's meeting location and time should be considered carefully, taking into consideration factors such as the charter members' ages, where they live and work, and how far they would have to travel in order to attend the meeting. For example, if a majority of the members are parents of young children and prefer spending their evenings at home, the meeting time would be set to no later than 1700. 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 and the election of officers. For sample agendas for the organizing club's first weekly meetings, see appendix 5.

## **Electing 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 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: club 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. It offers a valuable opportunity for these club leaders to further develop their plans and integrate them into the club's overall program.

### **Deciding the Club Committee Structure**

The committee structure should support the club's 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, club public relations, membership, service projects, and The Rotary Foundation). Additional committees should be appointed as needed annually. The board of the new club should develop a committee structure to meet its needs.

The responsibilities of each committee will be outlined in the club bylaws. Additional responsibilities may be referred to the committee by the club president or the club's board. 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.

### **Using the Club Leadership Plan**

The Club Leadership Plan is the recommended administrative structure for a Rotary club. Under the plan, Rotary clubs develop standard procedures for continuity, communication, and involvement of club members. The plan focuses on strategic planning and goal setting using the *Planning Guide for Effective Rotary Club*. Member education and involvement for fellowship and service are key aspects of the plan. Clubs should review the plan annually to ensure that it fits the needs and goals of the club. The Club Leadership Plan can be customized to reflect the identity of each club.

Assistant governors should assist club leaders with their efforts to implement the plan. For more information about the Club Leadership Plan, see appendix 6. You can also visit [www.rotary.org](http://www.rotary.org) or ask the district's CDA representative to provide more information.

### **Achieving Provisional Club Status**

The district governor gives an organizing group 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.

### **Applying for Membership in Rotary International**

Once the provisional club has 20 active charter members, it can submit the New Club Application Form to RI through the district governor. The list of members submit-

ted on the form is considered the club's complete charter membership list; after the application is submitted, no other members can be elected to the club pending the action of the RI Board on an application. The charter fee of US\$15 per member must accompany the application.

### **Submitting Accurate Club Charter Membership Lists**

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

As stated in the Rotary Code of Policies, 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)

# 6 Completing Required Forms

The following documents are essential to apply for membership in Rotary International:

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

All forms are also available at [www.rotary.org](http://www.rotary.org) and are provided as Microsoft Word templates on a CD-ROM distributed to district governors.

The Organization of New Club Survey should be completed and signed by the surveyor and submitted to the district governor, who reviews and signs it.

If the new club has a sponsor, the New Club Sponsor Form should be completed. *This form must be signed by the sponsor club president and secretary.*

The New Club Application Form, which includes the charter member list, should be signed by the club president and secretary to verify compliance with RI constitutional documents and Board policies. The special representative and district governor also sign the application, endorsing the club's admission, verifying the legitimacy of the membership list, and verifying club compliance with policy.

As district governor, you should review each of these documents carefully to verify the accuracy of all information and approve each form (the New Club Sponsor Form does not require the governor's approval). After signing the forms, forward them to the district's CDA representative. A copy should be kept for the club's files.

## EXPLANATION OF TERMS

The following terms are listed as they appear on the New Club Application Form.

### Charter Officers

Every club must have a president, president-elect, vice president (more than one is allowed), secretary, treasurer, and sergeant-at-arms. (Standard Rotary Club Constitution Article 9.4)

### Board of Directors

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. (SRCC Article 9.4)

### Club Constitution

Each new club is admitted to membership in Rotary International after adopting the Standard Rotary Club Constitution. (RI Bylaws 2.030)



## **Article 2: Name**

The official format for referring to a club is the "Rotary Club of community, state/province/prefecture, country."

A club name associates the club with its locality. The name is easily identifiable on a map so that someone unfamiliar with the area can determine the general location of the club.

When one or more clubs already exist in the community, the new club adds some other designation to the community's name, in order to distinguish it from the other club(s).

In addition to the above policy, 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. Furthermore, the name Paul Harris cannot be part of a club name.

The general secretary determines whether a name is appropriate and has the authority to reject any proposed new club name (or proposed existing club name change) if it is likely to cause dissension or confusion. The following examples provide guidelines for choosing an acceptable name:

### **Names for Multiple Communities**

Three communities	Belford-Roxo-Lote 15
Club serving a part of a county	Alpheretta/North Fulton County
County club indicating meeting site	Haywood County (Canton)

### **Names for Additional Clubs**

City neighborhood	Chania (Crete)
Year chartered	Piatra Neamt 2005
Civic nickname	Carlsbad (Cavern City)
Civic landmark	Nagoya Airport
Person's name	Hilton Head Island-Van Landingham
Serving a shore area	Tampa Bay (Tampa)

*(Note: "Tampa Bay" alone is not acceptable because it doesn't describe a community.)*

### **Names for Meeting Times**

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

If the name of the proposed club is the same as a terminated club, full details should be given.

## **Article 3: Locality of the Club**

The typical description for a club locality is "The city or town of (city/town name) and the surrounding area."

### **Article 13: Rotary Magazines**

Every club member must subscribe to *The Rotarian* or an official Rotary regional magazine (see the complete list in the *Official Directory*). A few countries are excused by the RI Board from subscribing to a magazine.

### **Club Bylaws**

A club adopts a set of bylaws that are in harmony with the club's constitution and the RI constitutional documents. If the new club's bylaws are a modified version of the Recommended Rotary Club Bylaws, the adopted club bylaws must be attached to the application. The Recommended Rotary Club Bylaws are available at [www.rotary.org](http://www.rotary.org) and from your CDA representative.

### **Meetings**

A club may hold its weekly meeting when and where it wishes. However, RI expects clubs to meet in places where all Rotarians may make up, regardless of race, religion, gender, or nationality. The annual meeting of the club for the election of officers by the members must be held between 1 July and 31 December. Board meetings are held monthly.

### **Club Fees and Dues**

Clubs must have an admission fee of at least US\$15 and minimum annual dues to cover per capita dues to Rotary International, or fees that are equal in purchasing power for local currency.

### **RI Charter Fee**

Paid to RI for admission of the new club, the charter fee is calculated as the number of charter members multiplied by US\$15 or its equivalent.

### **Sponsor Club**

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.

### **Special Representative**

RI requires current contact information for special representatives in the event of questions or problems with new club applications.

### **New Club Contact Information**

RI needs accurate club contact information in order to send introductory materials to new clubs.

### **Charter List**

All new club applications require a list of active charter members including names, contact information, gender, and classification. Only active membership is listed on the charter form (the honorary membership list is maintained by the club).

*Charter lists are subject to random verification.* RI will contact the district governor if a charter list is inaccurate.

### ***Name***

Names will appear on official records and mailing labels as written on the charter list.

### ***Gender***

All Rotary clubs are encouraged to have membership consisting of both men and women. When completing the form, please make sure to mark each charter member's gender on the form.

### ***Former Rotarian***

A former Rotarian is any person who has been a member of a Rotary club. A Rotarian who is joining the new club must resign membership in another club by the time the new club is admitted. Former Rotarians are asked to provide their RI member identification numbers and their former club names on the form. This information helps to verify a person's qualifications and maintain accurate records.

### ***Classification***

Use of classification ensures that membership represents the business and professional life of the club's locality. A classification is determined by the member's activity or service, not the title held. For example, if a member is a bank president, the classification is *not* "bank president" but rather "commercial banking" (activity of the firm) or "banking administration" (professional activity). (For additional information on classifications, see chapter 4.)

### ***Current (or Former) Firm and Title/Position***

This information helps verify the appropriateness of a classification and provides guidance if problems arise on the classification list. If a member is self-employed, "self-employed" should be noted instead of the name of the firm. An executive position is one in which the person either

- Is engaged as proprietor, partner, corporate officer, or manager of any worthy and recognized business or profession
- Holds an important position in any worthy and recognized business or profession or any branch or agency thereof and has executive capacity with discretionary authority
- Has retired from any position listed above

### ***Contact Information***

This information is kept in the RI database and used only for contacting the Rotarian. It is highly recommended that members' e-mail addresses be provided. According to the RI privacy policy, this information is not distributed.

If you have any questions about whether a person qualifies for inclusion on the charter list or any other charter-related matter, please contact your CDA representative.

## **FORMS CHECKLIST: AVOIDING COMMON APPLICATION MISTAKES**

Each year, many clubs make the same mistakes when filling out their application forms. The following checklist highlights areas on the forms that you should pay special attention to. As you review your forms, use the checklist to help ensure that they're filled out correctly and that all required information is included.

### **Organization of New Club Survey**

- Special representative's club name and full address are included.
- For clubs with sponsor club(s):* The New Club Sponsor Form accompanies the survey.

### **New Club Sponsor Form**

- Number of sponsor club members is included.

### **New Club Application Form**

#### *Page 1*

- The signatures of the provisional club president and secretary (not those of the sponsor club) are included.

#### *Page 2*

- Name of president-elect is included. (Even if it's the same as the president, the name should be reentered on the line provided for president-elect.)
- Description of locality as it appears in Article 3 of the club's constitution is included.
- Suitable entry for "Rotary Magazines" is marked.

#### *Page 3*

- Full address of the meeting place, including the postal code, is provided.
- Admission fees in local currency equal US\$15.
- Annual dues in local currency cover the current per capita dues to RI.

#### *Page 4*

- Mailing address of special representative includes postal code.

### **Charter List**

- Gender is noted.
- "Former Rotarian" entry is marked.
- "Classification" entry is the member's classification (not title/position).
- Name of current (or former) firm is provided (if there is no name of firm, "self-employed" may be used).
- Title/position is provided. If the member is the owner, proprietor, or partner, use these same terms for these lines.
- Residence and business addresses are both given. If both addresses are the same, the appropriate box under "Business Address" is checked.
- Postal code in business address/residential address is included.
- Number of members in charter list matches the number of members for which charter fees are paid.

### **All Forms**

- Any entry that doesn't apply is clearly marked, either with a "not applicable" notation or by crossing out the inapplicable text. In general, however, all entries on the forms should be completed.



# Organization of New Club Survey

## MEMBERSHIP IN ROTARY INTERNATIONAL

AREA TO BE SERVED: \_\_\_\_\_  
*(community, state/province/prefecture, country)*

Please describe the various aspects of the locality in each of the categories below:

POPULATION:

ECONOMIC OUTLOOK:

PRINCIPAL INDUSTRIES, ACTIVITIES, AND INSTITUTIONS:

OTHER SERVICE ORGANIZATIONS:

FORMER ROTARIANS *(list names and former clubs):*

POSSIBLE MEETING PLACES:

PEOPLE WHO MIGHT FORM THE BASIS FOR A NEW CLUB AND THEIR OCCUPATIONS: *(the number of people with the same classification on a charter list is limited)*

LOCALITY DESCRIPTION *(for example, "The city of Chicago and surrounding area"):*

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

POSSIBLE SPONSOR CLUB(S):

New club will not have a sponsor club.

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

\_\_\_\_\_  
Signature Date

**District Governor's Decision**

This locality  is  is not capable of supporting a Rotary club.

The sponsoring Rotary club(s) will be the Rotary Club of \_\_\_\_\_

**My special representative will be**

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

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

First Name: \_\_\_\_\_ Middle Name: \_\_\_\_\_

Rotary Name (as it would appear on badge): \_\_\_\_\_

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

**Telephone** (including country/city/area codes) **Fax** (including country/city/area codes)

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

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

Other: \_\_\_\_\_

**Preferred E-mail Address:**  Residence  Business \_\_\_\_\_

**Preferred Mailing Address\*** (check one):

Residence  Business  Other (indicate below)

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

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

District \_\_\_\_\_

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

Send the original of this completed survey to the district governor for approval. The district governor will forward the original to your CDA representative; keep a copy for the club's files.



# New Club Sponsor Form

## MEMBERSHIP IN ROTARY INTERNATIONAL

The Rotary Club of \_\_\_\_\_

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)

- 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.*)

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

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







# New Club Application Form

## MEMBERSHIP IN ROTARY INTERNATIONAL

The provisional Rotary Club of \_\_\_\_\_  
hereby applies for membership in Rotary International and confirms that the club

1. Will abide by the Constitution and Bylaws of Rotary International
2. Has adopted the Standard Rotary Club Constitution prescribed by Rotary International 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 Rotary International, including the Standard Rotary Club Constitution
4. Will not become a member of, or assume obligations of membership in, any organization other than Rotary International
5. Shall maintain the obligations of a member club in Rotary International and be subject to the jurisdiction of Rotary International

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 Rotary International and that the information in this application is accurate.

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

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

We, the governor of District \_\_\_\_\_ and the special representative, concur that this application meets the requirements set forth in the constitutional documents of Rotary International and the policies of the RI Board of Directors and do hereby 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.

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

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

\_\_\_\_\_

**Charter Officers**

President \_\_\_\_\_

Secretary \_\_\_\_\_

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

Treasurer \_\_\_\_\_

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

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

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

**Board of Directors**

President, president-elect, and vice president are mandatory board members. The club may elect the secretary, treasurer, and sergeant-at-arms as directors by virtue of office. Please list all of the club's nonmandatory directors.

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

**Club Constitution**

Complete this section to correspond with the articles of the Standard Rotary Club Constitution as listed in each category.

**Article 2: Name**

Rotary Club of \_\_\_\_\_  
*(complete name, including community, state/province/prefecture, country)*

**Article 3: Locality of the Club**

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

**Article 13: Rotary Magazines**

*(check one)*

- Everyone subscribes to *The Rotarian*.
- The Rotary regional magazine for this club is \_\_\_\_\_, and everyone subscribes to either it or *The Rotarian*. (On the charter list, mark "TR" by the name of each member who subscribes to *The Rotarian*; everyone else is expected to subscribe to the Rotary regional magazine.)
- Club is in a country excused by the RI Board from subscribing to a magazine.

**Club Bylaws**

The following information concerning club bylaws refers to the bylaws recommended by the RI Board. Unless these recommended bylaws are adopted without modification, the full text of the bylaws adopted by the club must be attached to this application.

Number of directors elected annually: \_\_\_\_\_  
*(Matches the number of elected directors given on page 2 unless otherwise specified here.)*

**Meetings**

Weekly meeting: \_\_\_\_\_  
 Day of week \_\_\_\_\_ Time \_\_\_\_\_

Place *(include the complete address)*  
 \_\_\_\_\_  
 \_\_\_\_\_

Postal Code: \_\_\_\_\_

Restaurant  Hotel  Other

*(Circle the correct information)*

**Annual:** 1st, 2nd, 3rd, 4th week of  
 July, August, September, October, November, December

**Board:** 1st, 2nd, 3rd, 4th  
 Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday  
 of each month

**Club Fees and Dues**

Clubs must have an admission fee of at least US\$15 and minimum annual per capita dues as currently required by RI, or its equivalent in purchasing power for local currency.

Admission Fee: \_\_\_\_\_ Annual Dues: \_\_\_\_\_

**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 by:**

Check\*  Money order  Fiscal agent receipt

Receipt of deposit to an RI bank account outside USA

*\*Non-U.S. clubs paying by check must have their check drafted through a U.S. bank. For more information, contact your CDA representative.*

**Sponsor Club**

Rotary Club of \_\_\_\_\_

Number of members (excluding honorary): \_\_\_\_\_

**Special Representative**

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

Contact information for the special representative has not changed from the Organization of New Club Survey.

New contact information for the special representative:

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

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

First Name: \_\_\_\_\_ Middle Name: \_\_\_\_\_

Rotary Name (*as it would appear on badge*): \_\_\_\_\_

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

Telephone (including country/city/area codes)      Fax (including country/city/area codes)

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

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

Other: \_\_\_\_\_

Preferred E-mail Address:    Residence    Business \_\_\_\_\_

Preferred Mailing Address\* (check one):

Residence    Business    Other (indicate below)

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

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

**New Club Contact Information**

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

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Telephone** (include country/city/area codes): \_\_\_\_\_

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

**E-mail Address:** \_\_\_\_\_

**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 section to complete information for each member (minimum of 20 charter members).*

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

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

First Name: \_\_\_\_\_ Middle Name: \_\_\_\_\_

Rotary Name (as it would appear on badge): \_\_\_\_\_

Gender:  Male  Female

Former Rotarian:  No  Yes

If yes, Rotary International membership ID number: \_\_\_\_\_

Name of former club: \_\_\_\_\_

Classification: \_\_\_\_\_

Current (or Former) Firm and Title/Position: \_\_\_\_\_

**Contact Information**

Telephone (including country/city/area codes) \_\_\_\_\_ Fax (including country/city/area codes) \_\_\_\_\_

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

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

Other: \_\_\_\_\_

Preferred E-mail Address:  Residence  Business \_\_\_\_\_

Preferred Mailing Address\* (check one):

Residence  Business  Other (indicate below)

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

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

Residence Address (if same as preferred, you may leave blank)

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

Business Address (if same as preferred, you may leave blank)

Same as Residence

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

# 7 Charter Presentation

The charter presentation meeting, at which the new club is officially welcomed into Rotary, should be one of the most memorable events in the history of a Rotary club. The main features of the program should be an inspirational Rotary address and the presentation of the charter by the district governor.

The charter for a new club, signed by the president of Rotary International 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 Charter Presentation 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 for the Presentation

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

- An outline of the growth of Rotary
- A review of what the club has agreed to by joining Rotary International
- Rotary's meaning to its individual members and to the community
- The benefits of Rotary fellowship in the district and around the world
- The importance of steady membership growth and development
- The benefits and importance of attending the district conference and the RI Convention

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 a charter presentation meeting checklist, see appendix 7.

### ***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.

### ***Estimate of Expenses***

It is imperative that no deficit results from the meeting. The price of the ticket should be reasonable but appropriate to cover all meeting expenses.

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 8 or go to [www.rotary.org](http://www.rotary.org).) Photos and biographies of the founder of Rotary and the current RI president and general secretary are available on request from the RI Public Relations Division. The division can also provide guidelines, tools, and resources to help your district achieve media success.

To help create friendly relations with local media, send complimentary tickets to the publishers or editors of local newspapers and the directors of television and radio stations.

### ***Registration***

Provide sufficient registration facilities. To facilitate introductions, name badges should be prepared for all visitors with the name of their Rotary club, if appropriate.

### ***Program***

The entire program should be designed to foster fellowship and inspire the new club's members. If facilities permit, precede the actual banquet with a reception or fellowship hour. RI suggests that name badges for new Rotarians and their spouses be different from those worn by visitors.

Due consideration should be given to selecting the Rotarian who will give the principal address. The speaker should have an excellent Rotary background and the ability 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. Each participant should receive a copy of the program in advance.

A suggested program outline follows:

- Reception/fellowship hour
- Call to order
- Invocation
- General 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

### ***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
- Other information of interest

### ***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.

### ***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*

Personally greeting each guest is very important. The sponsoring club frequently provides the welcoming committee. The welcoming committee should receive a list of Rotary clubs represented.

### *Seating*

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.

## 8 Supporting New Rotary Clubs

After the RI Board approves the provisional club's application, the club becomes a member club of Rotary International, and the district governor is notified. The special representative's responsibility continues until the president, secretary, and chairs of the principal committees have a working understanding of their respective duties.

### **Developing Club Assessment Tools**

Regular assessment is essential to developing and maintaining effective and successful club operations, especially for new clubs. Encourage the new club to create assessment tools that meet their specific needs as they evolve. In addition, RI offers a variety of tools that can help identify opportunities to make clubs more relevant to members and communities. These include the Membership Satisfaction Questionnaire, the Club Inventory, and the *Planning Guide for Effective Rotary Clubs* (appendixes 9-11). All forms are also available at [www.rotary.org](http://www.rotary.org).

### **Submitting First Semiannual Report and Dues**

Guide the new club president and secretary through the process of submitting semiannual report 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 from 16 May through 30 June are excused from submitting a 1 July semiannual report and dues. The same applies to clubs admitted 16 November through 31 December in regard to the 1 January semiannual report and dues (new clubs will be billed for their magazine subscriptions beginning on their date of admission; charges will appear on the first semiannual dues billing sent to the club). A prorated payment will be due for new (not charter) members admitted from July to September and from January to March, respectively. The club will be billed for prorated members as part of the semiannual dues billings.

### **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 the Rotary Code of Policies 9.020.2 – 9.020.8.

### **Using Rotary Literature**

Rotary literature and materials are sent to the club secretary following the club's admission to RI (see appendix 12 for a complete list). 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 development committee and club members to educate prospective members.

# 9 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 an Organization of New Club Survey necessary?**

Yes, the 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. A new club may have one or more sponsor clubs.

## **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 20; there is no maximum.

## **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 20 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.

## **Is a classification such as "real estate agent " acceptable?**

No. A classification describes an activity of the firm or the person's professional activity, not the title or position. Thus, the classification "real estate agency" or "real estate sales" should be used.

## **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 their intent, so that the member's resignation is terminated by the date that the provisional club is admitted to membership. 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 9 for more information.

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

When a partial charter list is ready, send it to the CDA representative for your district for review and comment.

**Is it just a formality for the 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 application.

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

No. The district governor must first approve the Organization of New Club Survey and then assign a special representative. The governor also must attest to the fact that the completed application has been reviewed and approved.

**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. For extension to non-Rotary countries, the individual must work through the RI Extension of Rotary Committee.

# 10 Best Practices of Sponsor Clubs

Sponsor clubs that were involved in the process of organizing new clubs in their districts used the following practices and contributed tremendously to the success of those new clubs. These practices can be adjusted to fit clubs in any district. If you know of similar best practices by sponsor clubs, please share them with RI's Membership Development Division.

## **District 2070 (part of Italy; San Marino)**

**New clubs** Rotary Club of Livorno Mascagni, Italy  
Rotary Club of Modena L.A. Muratori, Italy

**Sponsor clubs** Rotary Club of Livorno, Italy  
Rotary Club of Modena, Italy

The new clubs were chartered in 2001-02. The district governor for that year pointed to several successful practices that led to their organization:

### **1. Emphasizing commitment**

Once a list of prospective members was formed, the district governor and the president of the sponsor club met with the future president of each of the new clubs to discuss their commitment to the new clubs. They discussed the charter members' personal and professional qualities, their commitment to Rotary, and their wish to carry out the ideal of Service Above Self.

### **2. Conducting multiple meetings with prospective members**

Following the meetings with the future presidents, the sponsor clubs conducted several meetings with prospective charter members. These meetings were well attended by prospective members and provided opportunities for exchange of information. They were characterized by lively debates, which allowed the organizers to learn about the candidates' personal qualities and, most of all, their willingness to serve. During the process, some candidates realized that Rotary was not right for them and decided to withdraw. Of the remaining candidates, most proved to have the necessary qualifications to be Rotarians. Today, they represent the foundation of their respective clubs.

### **3. Avoiding hastiness in organizing new clubs**

The new clubs were founded only when the sponsor club, the district governor, and the special representative were completely certain that the new members were ready for membership in a Rotary club.

### **4. Involving presidents of sponsor clubs directly**

The presidents of the sponsor clubs were directly involved in the chartering process and provided ongoing assistance to the new clubs.

## **District 3170 (Union Territory of Goa and parts of Karnataka and Maharashtra, India)**

**New clubs** Rotary Club of Kolhapur Heritage, Maharashtra, India  
Rotary Club of Belgaum North, Karnataka, India

**Sponsor clubs** Rotary Club of Kolhapur, Maharashtra, India  
Rotary Club of Belgaum South, Karnataka, India

The charter lists of both clubs, which were chartered in 2001-02, were composed of Rotarians under the age of 35. The sponsor clubs used these strategies to achieve this goal:

### **1. Understanding future Rotarians' needs**

While searching for prospective members for their own club, members of the Rotary Club of Belgaum South realized that the 25-35 age group had not been represented in any of the four clubs in Belgaum. They found out that many people in that age group had been willing to join Rotary but would have been uncomfortable in any of the existing four clubs, where the average age had been 45. Following that, they decided to organize a new club.

### **2. Approaching past Rotaractors**

Although many past Rotaractors had already left the community to pursue their careers, the Rotary Club of Kolhapur made the effort to locate those who remained in the area. Ten past Rotaractors were located and soon joined the new organizing club.

### **3. Recruiting members of other volunteer groups**

The special representative encouraged the members of the Rotary Club of Kolhapur to approach Round Table members who had been looking for an opportunity to serve the community.

### **4. Feeling a moral obligation to the community**

The members of the Rotary Club of Kolhapur considered sponsoring the new club their moral obligation to the younger segment of their community. Belgaum South club members reported that Belgaum North club members still look to them for advice.

## **District 3800 (Philippines)**

**New club** Rotary Club of Mandaluyong-Pasig-San Juan, Metro Manila, Philippines

**Sponsor club** Rotary Club of Sampaguita-Grace Park, Kalookan, Philippines

The first all-alumni Rotary clubs — the Rotary Club of Mandaluyong-Pasig-San Juan and the Rotary Club of Colombo Reconnections, Western Province, Sri Lanka (District 3220) — were chartered in 2002. The charter members were former Group Study Exchange team members and Ambassadorial Scholars.

The following steps led to the successful organization of the Mandaluyong-Pasig-San Juan Rotary club:

### **1. Approaching Rotary Foundation alumni**

The Foundation Alumni Resource Group's area coordinator for Asia, who is a member of the Rotary Club of Sampaguita-Grace Park, invited the district's 300 Foundation alumni to a reunion and fellowship dinner. Thirty-two alumni attended the event and enjoyed a pleasant evening in which they expressed their gratitude to The Rotary Foundation. They began holding monthly meetings at a central coffee shop, which the district governor and past district governors joined as well.

### **2. Suggesting Rotary as a support system for ongoing service projects**

Once the group of alumni began developing independent service projects, the Rotarians involved with the group described Foundation programs, such as a World Community Service project and Matching Grants, that would be available to them if they were to become Rotarians. The group then decided to form the first all-alumni Rotary club.

### **3. Remaining personally involved and providing long-term support**

Members of the sponsor club, including the Foundation Alumni Resource Group's area coordinator (later appointed as the special representative), remained involved in the development of the new club for more than a year and a half, regularly attending its weekly meetings. Following that, the special representative continued visiting the club regularly and offering advice and support.

## **District 4920 (parts of La Pampa and Buenos Aires, Argentina)**

**New club** Rotary Club of Treinta de Agosto, Buenos Aires, Argentina

**Sponsor club** Rotary Club of Trenqué Lauquén, Buenos Aires, Argentina

The Rotary Club of Trenqué Lauquén implemented its membership development and retention plan, which had originally been planned for the club's own use, in order to organize the Rotary Club of Treinta de Agosto. The main strategy was to approach the community of Treinta de Agosto and, using a thorough process, identify individuals who would make excellent Rotarians, without initially revealing to them the goal of starting a new Rotary club.

The two-month implementation process included these practices:

### **1. Inviting community members to brainstorming sessions**

Four non-Rotarian members of the Treinta de Agosto community were invited to participate in individual brainstorming sessions. Based on the club's belief that the best service project they could offer a community without a Rotary club was creating a Rotary club in that community (which will eventually implement numerous service projects of its own), each of the four attendees was told that the Rotary Club of Trenqué Lauquén intended to implement a major project in their community. Each of them was asked to provide names of individuals with recognized



willingness to serve, strong ethical principles, and a record of service in the local community.

## **2. Evaluating individuals' qualifications**

Once members of the community provided 120 names, the board of directors evaluated the personal and professional qualifications of each candidate and narrowed the list to approximately 70 candidates.

## **3. Inviting candidates to introductory meeting**

While still not informed about the meeting's content, the selected 70 candidates were invited to a 45-minute introductory lecture about Rotary. Twenty-five of them attended the meeting, where they were told about the sponsor club's projects and the benefits and responsibilities of Rotarians. The club members conveyed their belief that creating a new Rotary club was the best service project they could offer a community without a Rotary club. Attendees were also informed that they had been carefully chosen as candidates, and the names and classifications of club members were revealed to them. Following a friendly question-and-answer session, attendees were asked to fill out a survey to gauge their interest in becoming members of a new Rotary club.

## **4. Issuing formal invitations**

Formal invitations to join a Rotary club were sent to 15 attendees who responded positively, and the district governor appointed a special representative. The process was repeated twice, and additional interested candidates were added to the list.

## **5. Providing long-term support**

Soon after it was chartered, the Rotary Club of Treinta de Agosto implemented several community projects, including transporting disabled children to recreational activities in neighboring cities, clearing open spaces suitable for soccer and basketball fields for youth, and participating in the Youth Exchange program. Members of the Rotary Club of Trenqué Lauquén, the special representative, and members of the club's membership development committee continued visiting and assisting the new club for more than a year after its chartering.

### **District 5030 (Washington, USA)**

District 5030 recruited 160 charter members who formed four new Rotary clubs in 2003-04. The chair of the district extension committee reported these successful strategies:

#### **1. Sharing sponsorship**

Three out of the four new clubs enjoyed the support of not one but three sponsor clubs. While one of the clubs was appointed as the lead sponsor club, all shared responsibility for the new clubs. This practice enabled the new clubs to benefit from additional support, advice, and sources of information.

#### **2. Providing consistency**

The sponsor club's extension chair made sure that a representative of the sponsor club was present at each meeting of the new organizing club. The district exten-

sion chair and vice chair visited every meeting of each new club during the club's first year.

### 3. Emphasizing provisional club status

The sponsor club stressed the significance of achieving provisional club status. Members of the new club were made aware that the status of provisional club entitled them to offer make-up meetings for Rotarians, even if the club itself had very few members.

### 4. Focusing on networking

Before the organizing club became a provisional club, its meetings focused on networking opportunities. The new organizing club members were encouraged to introduce and reintroduce themselves every week, for the sake of new members. In addition to taking part in programs about the history, organization, and structure of Rotary, members of the organizing club were invited to speak about their community, businesses, and families, which made them feel comfortable and allowed everyone to see the many benefits of membership in the club. Once the club was chartered, networking was no longer considered the main activity of the meeting.

## District 5240 (California, USA)

**New clubs** Rotary Club of Cambria Sunrise Centennial, California, USA  
Rotary Club of Simi Sunset, California, USA

**Sponsor clubs** Rotary Club of Cambria, California, USA  
Rotary Club of Simi Sunrise, California, USA

In District 5240, the Rotary Club of Cambria Sunrise Centennial was chartered on Rotary's 100th anniversary, 23 February 2005. The Rotary Club of Simi Sunset was chartered in 2001-02. In both cases, the ongoing support provided by the sponsoring clubs was key to the success of the new clubs:

### 1. Encouraging regular meetings regardless of number of members

The Rotary Club of Cambria encouraged the organizing club to begin conducting regular meetings when it had only three potential members (as they told them, "All you have to do is find 17 additional members, and you'll have a new club!"). This provided the organizing club an opportunity to experiment with meeting times and locations while recruiting additional potential members.

### 2. Adapting meeting time to attract younger members

The Rotary Club of Simi Sunrise decided to hold the new club's meetings at 1730, allowing prospective charter members with young families to attend meetings right after work.

### 3. Visiting the provisional club to make up missed meetings

Once the Rotary Club of Cambria Sunrise Centennial received provisional club status, members of the sponsoring Rotary Club of Cambria began joining its

meetings for make-up meetings. The 2005-06 president of the Cambria Sunrise Centennial club recalled that first provisional club meeting, attended by sponsor club members, as a significant moment for the fledgling club.

#### **4. Forming a symbiotic relationship instead of competition**

About two months after the Rotary Club of Cambria Sunrise Centennial began organizing, the provisional club and sponsor club held a joint membership mixer and social event. Non-Rotarian attendees who were invited to join a meeting of the sponsor club but couldn't make it at that specific time were referred to the provisional club by members of the sponsor club, and vice versa. Both clubs viewed this as an opportunity to invite a new person to Rotary, not compete for members.

#### **5. Ensuring increased membership in the sponsor club**

To prevent losing its own members to the new club, the sponsoring Rotary Club of Simi Sunrise encouraged its members to invite spouses and former Rotarians to join the sponsor club. The Simi Sunrise club increased its membership from 87 to 104 members during the period of organizing the new Rotary Club of Simi Sunset.

#### **6. Inviting districts leaders to create a remarkable charter night**

The 2005-06 president of the Rotary Club of Cambria Sunrise Centennial noted that the presence of many past district governors at the chartering ceremony left an immense impression on the new charter members.

#### **7. Establishing awards and recognition programs**

The Rotary Club of Simi Sunrise initiated recognition programs that provided constant recognition of provisional club members for their involvement in Rotary programs and club projects.

### **District 9200 (Eritrea; Ethiopia; Kenya; Tanzania; Uganda)**

The RI membership zone coordinator serving District 9200 credited the successful organization of new clubs in the district to these methods:

#### **1. Training Rotarians to teach about Rotary**

The sponsor club chose a group of devoted Rotarians and instructed them on how to present Rotary to prospective members. The Rotarians then met with a group of prospective members and conducted question-and-answer sessions.

#### **2. Consulting prospective members and developing a community project**

After introducing the group of prospective members to Rotary, the sponsor club asked for their help in identifying a small community project that Rotary could help develop in their community. Once the prospective members of the new club and the sponsor club decided on a project, they set out to implement it. The ceremony launching the project was well attended and well publicized. People from the community who were involved in the project and volunteered were identified and recruited as additional prospective members.





# Appendix 1: Worksheet for Organizing a New Rotary Club

	PERFORMED BY		TARGET DATE	DATE ACCOMPLISHED
1	District governor	<b>Organization of New Club Survey signed</b>	_____	_____
		↓		
2	District governor	<b>Special representative appointed</b>	_____	_____
		↓		
3	Sponsor club(s)	<b>New Club Sponsor Form submitted</b>	_____	_____
		↓		
4	District governor, special representative, sponsor club(s)	<b>Potential charter members recruited</b>	_____	_____
		↓		
5	Charter members	<b>Locality, club name, meeting location, meeting time determined</b>	_____	_____
		↓		
6	Charter members	<b>Club fees and dues, weekly meetings, election of club officers established and conducted</b>	_____	_____
		↓		
7	District governor	<b>Provisional club status declared</b>	_____	_____
		↓		
8	Charter members	<b>Standard Rotary Club Constitution, club bylaws, committee structure adopted</b>	_____	_____
		↓		
9	Charter members, district governor, special representative	<b>New Club Application Form submitted</b>	_____	_____
		↓		
10	RI Board	<b>New Rotary club admitted</b>	_____	_____
		↓		
11	District governor	<b>Charter presented</b>	_____	_____





## Appendix 2: Special Representative Activities

In carrying out your responsibilities as special representative, you may be involved in some or all of the following activities.

### **Calling the First Meeting**

Once four to six qualified people have agreed to become charter members of the new club, call the first meeting of the organizing group. Share the date, time, and place with prospective members, the district governor, and the president of the sponsor club so that it can be announced to club members. Suggested topics of the meeting include:

- Review of the membership and classification provisions of the Standard Rotary Club Constitution
- Review of the list of prospective members who might be invited to subsequent meetings
- Continued recruitment

### *Review of membership and classification provisions*

Review these provisions with everyone who will be recruiting members for the new club. Stress the need for a diversified group of charter members.

### *Review of list of prospective members*

Explain that each member will be assigned a classification that describes either the principal and recognized activity of the firm, company, or institution with which the member is connected or the member's principal and recognized business or professional activities. Also make the point that because having a charter membership with diverse business and professional interests is important, it's preferable to fill only one classification within a group of related classifications. However, the club should follow the 10 percent rule, which stipulates that no more than 10 percent of the charter members may be drawn from related classifications within a larger field, such as education, law, or medicine.

### *Continued recruitment*

Encourage prospective charter members to continue recruiting, thus emphasizing that they are the builders of their club. Distribute copies of *This Is Rotary* (001-EN) to those calling on prospective members.

Other ways you might work with the organizing club include:

- Appointing an acting treasurer to begin collecting any fees and dues from prospective members\*
- Discussing meeting logistics, club officers, club bylaws, and club committee organization

- Explaining the schedule of future meetings and agreeing on regular weekly meetings thereafter
- Organizing and presiding over additional meetings with the prospective charter members and the sponsor club as necessary to finalize
  - Day, time, and place of the weekly meeting
  - Club admission fee and dues
  - Adoption of the Standard Rotary Club Constitution and a set of bylaws
  - Provisional officers of the club
  - Charter members' understanding of club membership rules and the classification principle
- Helping the organizing group in completing and forwarding the New Club Application Form with the charter fee to the district governor
- Presiding at the first two meetings of the organizing Rotary club and the first board meeting of the club.

*\*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), if they have not already done so. 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 the club receives the EIN, it should notify the club's RI Club and District Administration (CDA) representative, so that the number can be included in the club's permanent records at RI World Headquarters.*

### **Assisting the New Rotary Club**

Along with the sponsor club, offer guidance to the new club for the first year after it has received its charter. This may involve these activities:

- Helping the new Rotarians become thoroughly informed about Rotary by attending weekly meetings
- Encouraging the sponsor club, other clubs in the district, and district committee members to assist with new member education
- Assisting the new club members at their first annual meeting
- 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 commence planning for their first service project
- Encouraging club members to become Rotary Foundation Sustaining Members





# Appendix 3: Sponsor Club Activities

A new club's success depends on how well it is organized and how well it operates in the first few months. After the new club receives its charter, the sponsor club acts as a mentor, remaining involved and offering guidance during the club's first year. The sponsor club's duties may include:

- Assigning a member responsible for ensuring that the bell and gavel, identification badges, make-up cards, Rotary banner, and other such customary items are at each meeting of the new club
- Asking the club's secretary to serve as an adviser to the secretary of the new club during its initial meetings
- Asking the club's president to join the special representative at the first regular board meeting of the new club
- Encouraging experienced members to help members of the new club become familiar with RI information, policies, and procedures
- Assisting the new club in planning its programs during its first year
- Planning joint fundraising activities

## Committee Organization

The sponsor club and district governor's special representative should work with the charter members to develop a committee structure that will support the club's goals and objectives. The Recommended Rotary Club Bylaws outline the structure and duties of the five recommended committees in articles 9 and 10. Additional committees should be appointed annually as needed. Review the recommended committee structure with the president, and discuss whether it addresses the current and future needs of the club.

Encourage the chairs of the sponsoring club's committees to meet with their counterparts in the new club. Invite members of the new club's committees to attend a regular meeting of the sponsoring club's committees so that they can understand better how an experienced committee works.

## 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 (see RI Club Administrative Software via Member Access at [www.rotary.org](http://www.rotary.org)) 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-EN).

Membership changes and terminations should be carefully recorded and reported either through Member Access or on the Membership Data Form (available 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.

### **Club Bulletin**

Communication is an essential element of an enduring club. Help the club start a bulletin to announce programs for upcoming meetings and relate interesting news about the club, its members, and Rotary worldwide. After the new club appoints a club bulletin editor, have that individual meet with the sponsor club's bulletin editor to get ideas regarding topical issues, resources available from the district and RI, and how to produce the bulletin.

### **Club Web Site**

Many clubs develop their own Web sites to keep members informed and promote the club's activities to the community and beyond. Encourage the new club to consider launching its own site and linking it to the district's Web site and [www.rotary.org](http://www.rotary.org).

### **RI Web Site**

The RI Web site, [www.rotary.org](http://www.rotary.org), is an excellent source of information on administrative, membership, programs, public relations, and Foundation issues, and offers tools such as Member Access and the Club Locator.

### **First Club Assembly**

Before the first club assembly, advise the new club president on how to convene the meeting and assist club committee chairs in developing initial committee plans, as needed.

### **Weekly Club Programs**

The sponsor club should work closely with the president and program chair to plan programs for at least the first six weeks. Based on your club's experience, share effective techniques for planning, soliciting, and presenting good programs, including techniques for identifying interesting speakers.

### **Membership Development**

Stress to the officers of the new club the importance of having a plan to steadily increase membership. Encourage the use of the *Membership Development Resource Guide* (417-EN), the *Planning Guide for Effective Rotary Clubs*, and other membership materials that are sent to all new Rotary clubs (available at [www.rotary.org](http://www.rotary.org)) for ideas on recruiting and retaining members. Offer to help the president or appropriate committee chair to educate all members on how to propose and elect a new member as outlined in Article 13 of the Recommended Rotary Club Bylaws.

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

- Well-planned weekly programs
- Committees' progress on goals related to membership growth, community service, The Rotary Foundation, and developing club leaders
- Monthly board of directors meetings

Continue to support the new club through these activities:

- Planning intercity meetings with the new club
- Encouraging your club members to attend regular meetings of the new club
- Encouraging the new club's members to make up at a nearby club
- Informing club members who travel about Club Locator at [www.rotary.org](http://www.rotary.org), so they can find meeting times for clubs in the area they are visiting
- Encouraging members to attend the district conference



## Appendix 4: Classifications

The sample classifications listed below are intended to provide an example; new clubs are not expected to adopt the list.

### **Activity or Service, Not Title**

A classification is determined by the member's activity or service, not the title held. For example, if a member is a bank president, the classification is not "bank president" but rather "commercial banking" (activity of the firm) or "banking administration" (professional activity).

Clubs should carefully consider the classification practice and broaden the interpretation of classifications where necessary to meet the modern-day business and professional environment. Separate classifications might be created to reflect distinct activities taking place under one corporate body or individual ownership. New classifications might also be appropriate when a company has changed its principal activity or added a new specialization to its activity or service.

For example, if a large university has three separate schools and each is sufficiently independent to determine its own policies, the club should establish a classification to cover the principal and recognized activity of each school, such as engineering schools, law schools, and medical schools.

### **Toward Balanced Membership**

It is vital that a Rotary club have a well-balanced membership in which no business or professional group predominates.

The RI Board recommends that no more than 10 percent of a club's classifications be in a related field, such as education, finance, insurance, law, medicine, and so on. Unusual conditions within the locality of a club may warrant a larger percentage, but the principle of a well-balanced membership should be maintained.

Older clubs whose filled classifications are out of balance should strive to increase the number of members under other classifications in order to achieve a well-balanced membership.

### **Classification Surveys**

To make best use of the classification principle, the club should survey the community and list all of the possible classifications that exist within the club's locality and the surrounding area. Classified telephone directories and other local business directories can be very useful in preparing the survey. Conducting the survey at the beginning of each Rotary year is the best way to ensure that the list reflects the most recent developments in the business and professional life of the community. In doing so, the survey needs to evaluate local business and professional conditions carefully.

The list compiled from the survey needs to include classifications of members who live in the community but work or conduct their business outside the club's territorial

limits. It should also include all classifications that exist in the entire area from which the club can draw its active members.

Every member should be provided with the list of filled and unfilled classifications. The bulletin editor can also use it in order to remind members periodically of unfilled classifications in the club.

### **Sample List of Classifications**

The following list is meant to provide guidance on proper terminology for classifications and suggest the diversity that a community's business and professional life can offer. *It is not a definitive list of classifications.*

Accounting	General Medical Practice	Newspaper Publishing
Commercial Schools	Hardware Retailing	Photography
Criminal Law	Linen Manufacturing	Optical Goods Retailing
Express and Transfer Service	Local Government	Police
Fruit and Vegetable Purchasing	Machinery Distributing	Public Relations



# Appendix 5: 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. These meetings should follow the format of the sponsor club or other clubs in the area. Feel free to adapt the agendas below to fit your needs.

## First Meeting

- 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 what Rotary means to the community and the member.
- Explain the four Avenues of Service, the elements of an effective club, and other guiding principles identifying Rotary membership.
- Distribute copies of *This Is Rotary* (001-EN) and *Rotary Basics* (595-EN).
- Explain the role of the district and the district governor. Refer to the *Manual of Procedure* (035-EN).
- Explain the attendance requirements, and mention where members can make up meetings, either locally or through an e-club. (For more information on make-up meetings and a list of e-clubs, go to [www.rotary.org](http://www.rotary.org) and click Membership.)
- Explain the purpose of district meetings and the RI Convention.
- Explain the importance of membership, the purpose of the classification system, the need for new members, and the members' responsibility to bring in new members.
- Stress membership requirements:

Members must be adults of good character and good business or professional reputation, who either

  - Are engaged as proprietor, partner, corporate officer, or manager of any worthy and recognized business or profession
  - Hold an important position in any worthy and recognized business or profession or any branch or agency thereof and have executive capacity with discretionary authority
  - Have retired from any position listed above

They must also have their place of business or residence in the locality of the club or adjacent areas of the club or the surrounding area.
- Explain club, district, and RI financial obligations.

- Call for any payments of the US\$15 charter fee that haven't been received. Remind others to bring payment next week.
- Show the *Welcome to Rotary* DVD (264-MU) or present *Rotary Basics* (595-EN) or other RI resources and allow time for discussion.
- Announce and explain the schedule of subsequent meetings.
- Adjourn.

### Second Meeting

- Ask attendees to introduce themselves and state their professions. Recognize former Rotarians and those who plan to be members of the new club.
- Review again the membership and classification provisions. Explain the responsibilities and privileges of Rotary membership.
- Distribute *This Is Rotary* (001-EN) and *Rotary Basics* (595-EN) to those who didn't receive a copy at the previous meeting.
- Confirm the day, time, and place of the weekly meetings.
- Call for any outstanding funds, and remind those who haven't paid their \$15 charter fee to do so next week.
- 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 (assuming that the organizing club has the required minimum of 20 charter members). All members should come prepared to vote.
- Explain the schedules for the next few meetings.
- Adjourn.

### Third Meeting

*At the third meeting, the club may be ready to apply for membership in Rotary International. As soon as 20 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 Form.*

- 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 contacted your district's CDA representative.*)
- 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. RI-required fees and dues are noted in the membership application.
- Develop a club committee structure that supports club goals and objectives.

- Adopt club bylaws that are consistent with the Rotary International Constitution and Bylaws and the Standard Rotary Club Constitution (available for download at [www.rotary.org](http://www.rotary.org)).
- Clarify the statements on the first page of the New Club Application Form, explaining that members must agree to maintain the fundamental characteristics of Rotary.
- Elect officers.
- Adjourn.





## Appendix 6: Club Leadership Plan

The purpose of the Club Leadership Plan is to strengthen the Rotary club by providing the administrative framework of an effective club. Effective clubs are able to

- Sustain and increase their membership base
- Implement successful projects that address the needs of their community and communities in other countries
- Support The Rotary Foundation through both program participation and financial contributions
- Develop leaders capable of serving in Rotary beyond the club level

To implement a Club Leadership Plan, current, incoming, and past club leaders should

1. Develop a long-range plan that addresses the elements of an effective club.
2. Set annual goals using the *Planning Guide for Effective Rotary Clubs* in harmony with a club's long-range plan.
3. Conduct club assemblies that involve members in the planning process and keep them informed of the activities of Rotary.
4. Ensure clear communication between the club president, board, committee chairs, club members, district governor, assistant governors, and district committees.
5. Provide for continuity in leadership, including the concept of succession planning, to ensure development of future leaders.
6. Amend bylaws to reflect the club committee structure and roles and responsibilities of club leaders.
7. Provide opportunities to increase fellowship among members of the club.
8. Ensure that every member is active in a club project or function.
9. Develop a comprehensive training plan that ensures
  - Club leaders attend district training meetings
  - Orientation is consistently and regularly provided for new members
  - Ongoing educational opportunities are available for current members

Club leaders should implement the Club Leadership Plan in consultation with district leaders as described by the District Leadership Plan. The plan should be reviewed annually.

## Club Committees

Club committees are charged with carrying out the annual and long-range goals of the club based on the four Avenues of Service. The president-elect, president, and immediate past president should work together to ensure continuity of leadership and succession planning. When feasible, committee members should be appointed to the same committee for three years to ensure consistency. The president-elect is responsible for appointing committee members to fill vacancies, appointing committee chairs, and conducting planning meetings prior to the start of the year in office. It is recommended that the chair have previous experience as a member of the committee. Standing committees should be appointed as follows:

- **Membership**

This committee should develop and implement a comprehensive plan for the recruitment and retention of members.

- **Club Public Relations**

This committee should develop and implement plans to provide the public with information about Rotary and to promote the club's service projects and activities.

- **Club Administration**

This committee should conduct activities associated with the effective operation of the club.

- **Service Projects**

This committee should develop and implement educational, humanitarian, and vocational projects that address the needs of its community and communities in other countries.

- **The Rotary Foundation**

This committee should develop and implement plans to support The Rotary Foundation through both financial contributions and program participation.

Additional committees may be appointed as needed.

## Training Requirements

Club committee chairs should attend the district assembly prior to serving as chair.

## Relation to the District Leadership Team

Club committees should work with assistant governors and relevant district committees.

## Reporting Requirements

Club committees should regularly report the status of their activities to the club board and at club assemblies.



# Appendix 7: 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)
- Program items planned
  - Reception
  - Call to order
  - Invocation
  - General welcome
  - Dinner
  - Introduction of guests
  - Principal speaker
  - Presentation of charter
  - Introduction of charter members
  - Presentation of gifts
  - Expression of thanks
- 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
  - 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**

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# Appendix 8: 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 Club-District Support, then Effective Public Relations.



## Rotary International

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)

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### NEWS RELEASE

*[Insert title]*

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 the global association of Rotary International’s more than 32,000 clubs in nearly 170 countries. Rotary club membership represents a cross-section of the community’s business and professional men and women. The world’s Rotary clubs meet weekly and are nonpolitical, nonreligious, and open to all cultures and creeds.

The Rotary 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 political creeds who have made significant contributions to create a more peaceful world.”]*

Rotary’s largest contribution to global health began in 1985 with PolioPlus, its program to immunize all the world’s children against polio. To date, Rotary has committed more than \$500 million and countless volunteer hours through the PolioPlus program to the protection of over two billion children in 122 countries.

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

Founded in Chicago in 1905, Rotary is an organization of business and professional leaders united worldwide to provide humanitarian service and help build goodwill and peace in the world. Approximately 1.2 million Rotarians are members of over 32,000 Rotary clubs in nearly 170 countries. For more information about Rotary, visit [www.rotary.org](http://www.rotary.org).

###

You should add:

- Quote from new president on his or her plans and hopes for the year
- Club's community and international projects

*Note: Include a photo of your new club engaged in an activity, for example, planting the club's first tree or reading to children. On the back of the photo, write the names of those pictured and a brief description of the event.*



# Appendix 9: Membership Satisfaction Questionnaire

## Membership Satisfaction Questionnaire

This survey is intended for use by the club. All club members should complete it to help assess member satisfaction with club activities and projects. Please return your completed form to the club secretary. All responses are confidential.

Do you feel welcome in our Rotary club?  Yes  No

If no, why not? *(check all that apply)*

Compared to me, other members are *(check all that apply)*:

Older  Younger  Different gender  Different ethnicity

Other \_\_\_\_\_

I haven't made an effort to meet other members.

Club members haven't made an effort to interact with me.

Other \_\_\_\_\_

Do you feel comfortable sharing concerns with club leaders?  Yes  No

If no, why not? *(check all that apply)*

Club leaders have so many responsibilities; I don't want to burden them.

Club leaders have their own agenda and aren't interested in other ideas.

I haven't been a member long enough to feel comfortable approaching club leaders.

I don't want to be perceived as a complainer.

Other \_\_\_\_\_

How would you rate the level of our club's involvement in the following types of activities?

	Excessive	Adequate	Insufficient	Not Aware
Membership development	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Member orientation and education	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Local service projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
International service projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Club public relations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fundraising	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The Rotary Foundation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fellowship	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Have you participated in club projects and activities?  Yes  No

How did you become involved?  I volunteered  I was asked

Please indicate your involvement in the following types of activities:

	Currently Involved	Would Like to Be Involved
Membership development	<input type="checkbox"/>	<input type="checkbox"/>
Member orientation and education	<input type="checkbox"/>	<input type="checkbox"/>
Local service projects	<input type="checkbox"/>	<input type="checkbox"/>
International service projects	<input type="checkbox"/>	<input type="checkbox"/>
Club public relations	<input type="checkbox"/>	<input type="checkbox"/>
Fundraising	<input type="checkbox"/>	<input type="checkbox"/>
The Rotary Foundation	<input type="checkbox"/>	<input type="checkbox"/>
Fellowship	<input type="checkbox"/>	<input type="checkbox"/>
Other _____	<input type="checkbox"/>	<input type="checkbox"/>



How would you rate your level of satisfaction with your participation in club activities and projects?  Very satisfied  Satisfied  Dissatisfied

If dissatisfied, why? (check all that apply)

- |                                                  |                                                             |
|--------------------------------------------------|-------------------------------------------------------------|
| <input type="checkbox"/> Insufficient knowledge  | <input type="checkbox"/> Lack of resources                  |
| <input type="checkbox"/> Personality conflicts   | <input type="checkbox"/> Lack of support from other members |
| <input type="checkbox"/> Cost                    | <input type="checkbox"/> Insufficient family involvement    |
| <input type="checkbox"/> Personal time conflicts | <input type="checkbox"/> Other _____                        |

How would you rate the following costs associated with membership in our club?

	Excessive	Reasonable	Inadequate
Club dues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Weekly meetings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Club fines/assessments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Voluntary contributions to service projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Voluntary contributions to The Rotary Foundation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Do you enjoy our weekly meetings?  Yes  No

Please rate the following aspects of our weekly meetings:

- |                          |                                     |                                       |                                       |
|--------------------------|-------------------------------------|---------------------------------------|---------------------------------------|
| Amount of Rotary content | <input type="checkbox"/> Excessive  | <input type="checkbox"/> Adequate     | <input type="checkbox"/> Insufficient |
| Length                   | <input type="checkbox"/> Excessive  | <input type="checkbox"/> Adequate     | <input type="checkbox"/> Insufficient |
| Program organization     | <input type="checkbox"/> Good       | <input type="checkbox"/> Poor         |                                       |
| Location                 | <input type="checkbox"/> Convenient | <input type="checkbox"/> Inconvenient |                                       |

If inconvenient, suggested location: \_\_\_\_\_

Meeting time  Convenient  Inconvenient

If inconvenient, suggested time: \_\_\_\_\_

Which of the following aspects of our meeting place do you find unsatisfactory? (check all that apply)

- |                                               |                                           |
|-----------------------------------------------|-------------------------------------------|
| <input type="checkbox"/> Service              | <input type="checkbox"/> Décor/atmosphere |
| <input type="checkbox"/> Meal quality         | <input type="checkbox"/> Meal variety     |
| <input type="checkbox"/> Parking availability | <input type="checkbox"/> Safety           |
| <input type="checkbox"/> Other _____          |                                           |

Which of the following changes would improve our club meetings? *(check all that apply)*

- Better speakers
- More focus on fellowship
- Increased variety of program topics
- Increased emphasis on vocational information
- More involvement of family
- Better time management
- More service opportunities
- More leadership opportunities

How would you rate the amount of our club's fellowship activities?

- Too many
- Right amount
- Too few

How would you rate the amount of Rotary information in our club bulletin?

- Excessive
- Adequate
- Insufficient

Which of the following words would you use to describe the club bulletin? *(check all that apply)*

- Interesting
- Boring
- Informative
- Uninformative
- Useful
- Limited

Is there anything else you'd like to see changed?

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What response does your spouse/partner/family have to your involvement in Rotary? *(check all that apply)*

- Feels proud of my involvement
- Thinks Rotary takes too much of my time
- Wants to know more/be involved
- Thinks Rotary is too expensive
- Wants to meet/interact with other Rotary spouses/partners/families
- Other \_\_\_\_\_

Thank you for taking the time to complete this questionnaire and for your commitment to improving our club.



# Appendix 10: Club Inventory

## INVENTORY FOR THE ROTARY CLUB OF \_\_\_\_\_

(Use the preceding Rotary year as a base)

The club inventory follows the guidelines set forth for effective clubs. The RI Board has determined that success in the following areas is essential to being an effective club.

**Effective clubs are able to**  
Sustain and increase their membership base

Use the following to help evaluate the club's effectiveness in the area of membership.

- 1. Number of members as of 30 June of the preceding Rotary year: \_\_\_\_\_
- 2. Peak club membership since charter: \_\_\_\_\_
- 3. Net membership growth in our club: \_\_\_\_\_
- 4. Club's monthly attendance average: \_\_\_\_\_
- 5. What orientation does your club give to new members?

6. Does your club have a Rotary information program in place for both new and continuing members?

- Yes  No

If yes, please describe:

**Effective clubs are able to**  
Implement successful projects that address the needs of their community and communities in other countries

Use the following to help evaluate the club's effectiveness in the area of service projects.

- 7. Number of Rotary Youth Exchange students:
 

Hosted	_____
Sponsored	_____
- 8. Number of Interact clubs: \_\_\_\_\_
- 9. Number of Rotaract clubs: \_\_\_\_\_
- 10. Number of Rotary Community Corps: \_\_\_\_\_

- 11. Number of World Community Service (WCS) projects: \_\_\_\_\_
- 12. Number of grants received from  
The Rotary Foundation for WCS projects: \_\_\_\_\_
- 13. Number of RYLA students sponsored: \_\_\_\_\_
- 14. Number of Rotary Friendship Exchanges: \_\_\_\_\_
- 15. Number of Rotary Volunteers registered: \_\_\_\_\_
- 16. What other Rotary programs does the club participate in? \_\_\_\_\_

**Effective clubs are able to**  
Support The Rotary Foundation through both program participation and financial contributions

*Use the following to help evaluate the club's effectiveness in the area of Rotary Foundation support.*

17. Check the following humanitarian programs in which your club participates:

- District Simplified Grants
- Health, Hunger and Humanity (3-H) Grants
- Matching Grants

18. Club participation in educational programs:

Number of Ambassadorial Scholars:                      Nominated \_\_\_\_\_  
                                                                                                                                                                  Selected \_\_\_\_\_  
                                                                                                                                                                  Hosted \_\_\_\_\_

Number of Group Study Exchange (GSE) team members:  
                                                                                                                                                                  Nominated \_\_\_\_\_  
                                                                                                                                                                  Selected \_\_\_\_\_  
                                                                                                                                                                  Hosted \_\_\_\_\_

Number of Rotary Grants for University Teachers awarded: \_\_\_\_\_

Number of Rotary World Peace Fellows nominated: \_\_\_\_\_

19. Contributions:

General \_\_\_\_\_  
 Restricted \_\_\_\_\_  
 Cumulative total \_\_\_\_\_  
 Percentage of members contributing \_\_\_\_\_

Current year goal in US\$ \_\_\_\_\_

Will this goal be achieved?  Yes  No

**Effective clubs are able to**  
Develop leaders capable of serving in Rotary beyond the club level

*Use the following to help evaluate the club's effectiveness in the area of leadership development.*

20. Did your predecessor attend PETS last year?  Yes  No

21. Number of club members who attended these meetings:

District assembly \_\_\_\_\_

District Rotary Foundation seminar \_\_\_\_\_

District conference \_\_\_\_\_

RI Convention \_\_\_\_\_

District leadership seminar \_\_\_\_\_

22. Number of club members who have served, or expressed interest in serving, as:

Assistant governor \_\_\_\_\_

Member of a district committee \_\_\_\_\_

**Club Operations**

23. How frequently does the board meet? \_\_\_\_\_

24. How frequently are club assemblies held? \_\_\_\_\_

25. When was the most recent classification list updated? \_\_\_\_\_

26. Does the club have a budget?  Yes  No

If yes, is it audited annually?  Yes  No

27. Does the board receive regular financial reports?  Yes  No

28. How frequently is your club bulletin published?  Weekly  Monthly

29. How often does your club observe the special months on the Rotary calendar (for example, World Understanding Month, Rotary Foundation Month, and Magazine Month)?

Always  Occasionally  Never

30. Name the last club activity covered by the media and when it took place:

\_\_\_\_\_

This event was covered by (*check all that apply*):

Television    Newspapers    Radio    Other \_\_\_\_\_

31. Does your club include promotion of its activities in the club budget?

Yes    No

32. Are club members aware of the contents of the club's bylaws and constitution and of the *Manual of Procedure*?

Yes    No

# Appendix 11:

## PLANNING GUIDE FOR EFFECTIVE ROTARY CLUBS



Rotary International

The *Planning Guide for Effective Rotary Clubs* is a tool to help clubs establish goals for the coming year. The form can be used to track general club trends in membership and club administration. The *Planning Guide for Effective Rotary Clubs* is based on the concept of an effective club. An effective club is able to

- Sustain and increase its membership base
- Implement successful projects that address the needs of its community and communities in other countries
- Support The Rotary Foundation through both program participation and financial contributions
- Develop leaders capable of serving Rotary beyond the club level

The strategies listed in each section are common ways clubs might choose to pursue goals. Clubs are encouraged to develop alternative strategies to achieve their goals when appropriate.

Presidents-elect are encouraged to complete this form in cooperation with their club and submit a copy of it to their governor-elect or assistant governor by 1 July.

*Please type or print legibly*

ROTARY CLUB OF \_\_\_\_\_

Name of president: \_\_\_\_\_ Rotary year of office \_\_\_\_\_

Mailing address: \_\_\_\_\_

Telephone \_\_\_\_\_ Fax \_\_\_\_\_ E-mail \_\_\_\_\_

### DEMOGRAPHIC INFORMATION (as of 30 June)

Current number of members: \_\_\_\_\_

Number of members as of 30 June last year: \_\_\_\_\_ Number of members five years ago: \_\_\_\_\_

Number of male members: \_\_\_\_\_ Number of female members: \_\_\_\_\_

Average age of members: \_\_\_\_\_

Number of Rotarians who have been members for:

Less than 1 year: \_\_\_\_\_ 1-3 years: \_\_\_\_\_ 3-5 years: \_\_\_\_\_  
 5-10 years: \_\_\_\_\_ 10-25 years: \_\_\_\_\_ More than 25 years: \_\_\_\_\_

Number of members who have proposed a new member in the previous two years: \_\_\_\_\_

Does club membership reflect the diversity of the community?  Yes  No

Our classification survey was updated on \_\_\_\_\_ and contains \_\_\_\_\_ classifications,  
(date) (number)

of which \_\_\_\_\_ are unfilled.  
(number)

Our club has sponsored a new club within the last 24 months.  Yes  No

If yes, has your club implemented a plan to provide follow-up orientation for members of the sponsored club?  Yes  No

**MEMBERSHIP DEVELOPMENT (Recruitment, Retention, and Organizing New Clubs)**

---

Our club has established the following membership goal for the upcoming Rotary year:

Our club will strive to have \_\_\_\_\_ members by 30 June \_\_\_\_\_.  
(number) (year)

We have identified the following sources of potential members within the community:

**How does the club plan to achieve its membership goals? (check all that apply)**

- Develop a retention plan that focuses on maintaining high levels of enthusiasm through participation in interesting programs, projects, continuing education, and fellowship activities
- Appoint a committee of club members who have been trained in effective recruitment techniques
- Develop a recruitment plan that focuses on a true representation of the business and professional leadership in the community
- Develop a recruitment plan that focuses on a true representation of the diversity of the community
- Develop a recruitment plan that clearly explains the expectations of membership to potential Rotarians
- Implement an orientation program for new members to support their successful assimilation into the club
- Create a brochure that provides general information about Rotary as well as specific information about the club for prospective members
- Assign an experienced Rotarian mentor for every new club member
- Recognize those Rotarians who sponsor new members
- Conduct a public awareness program targeted at the business and professional community to increase awareness about what Rotary is and what it does
- Encourage members to join a Rotary Fellowship to experience the internationality and friendship of RI
- Participate in the RI Membership Development award programs
- Seek opportunities to organize a new club
- Other (please describe):

What makes this a good club to attract new members?

What aspects of this club could pose a barrier to attracting new members?

**Action steps:**



## SERVICE PROJECTS

---

Our club has established the following service goals for the upcoming Rotary year:

For our local community:

For communities in other countries (international service):

### How does the club plan to achieve its service goals? (check all that apply)

- Appoint a committee of club members who have been trained in how to plan and conduct a successful service project
- Review the club's current and ongoing service projects to determine whether they are relevant, needed, and of interest to club members
- Identify the social issues in the community that the club wants to address through its service goals
- Assess the club's fundraising activities to determine if they meet the club's project funding needs
- Involve each club member in the club's service projects
- Conduct or obtain a needs assessment of the community or communities in other countries
- Recognize club members who participate in and provide leadership to the club's service projects
- Identify a partner club with which to carry out an international service project
- Participate in:
  - Interact
  - Rotary Friendship Exchange
  - World Community Service
  - Rotaract
  - Rotary Volunteers
  - Youth Exchange
  - Rotary Community Corps
  - Rotary Youth Leadership Awards
- Use the resources of The Rotary Foundation to support a project identified by the club
- Other (please describe):

**Action steps:**

## THE ROTARY FOUNDATION

---

Our club has established the following Rotary Foundation goals for the upcoming Rotary year:

Our club will strive to achieve an annual giving goal of US\$ \_\_\_\_\_.

Our club will participate in Rotary Foundation programs by:

### How does the club plan to achieve its Rotary Foundation goals? (check all that apply)

- Appoint a committee of club members who understand the programs of The Rotary Foundation and who are committed to promoting financial support of the Foundation
- Help club members understand the relationship between Foundation giving and Foundation programs
- Schedule presentations that inform club members about the international service opportunities available through the programs of The Rotary Foundation
- Send a representative to the district Rotary Foundation seminar
- Use the resources of The Rotary Foundation to support the club's international projects
- Recognize club members' financial contributions to The Rotary Foundation and their participation in Foundation programs
- Encourage each club member to make a gift to the Annual Programs Fund
- Participate in:
  - Group Study Exchange
  - Matching Grants
  - District Simplified Grants
  - Health, Hunger and Humanity (3-H) Grants
  - PolioPlus/PolioPlus Partners
  - Host/Sponsor an Ambassadorial Scholar(s)
  - Sponsor a Rotary World Peace Fellow
  - Sponsor a University Teacher
- Invite Foundation program participants and alumni to participate in club programs and activities
- Other (please describe):

### Action steps:

## FUTURE ROTARY LEADERS

---

Our club has established the following goal for developing future Rotary leaders for the upcoming Rotary year:

Our club will identify \_\_\_\_\_ members as potential future leaders and notify the district by 30 June \_\_\_\_\_.  
(number) (year)

### How does the club plan to build future Rotary leaders? (check all that apply)

- Encourage committee chairs to attend the district assembly
- Encourage interested past presidents to attend the district leadership seminar held in conjunction with the district conference
- Use the expertise of the club's assistant governor
- Arrange for district committees to make presentations to club members
- Have club leaders work with the district governor and assistant governor to maximize the effectiveness of the governor's official visit
- Encourage new members to assume positions of leadership through participation in club committees
- Have club members visit other clubs to exchange ideas and share the knowledge they gain with the rest of the club
- Other (please describe):

### Action steps:

## GENERAL ADMINISTRATION

---

### What plans have you made to carry out the administrative tasks required for the effective operation of the club? (check all that apply)

- Board meetings have been scheduled on a regular basis.
- \_\_\_\_\_ club assemblies have been scheduled.  
(number)
- Club elections will be held on \_\_\_\_\_.  
(date)
- Our club will send at least \_\_\_\_\_ delegates to the district conference.  
(number)
- A club bulletin editor has been appointed to provide information that is beneficial to club members.
- The club Web site will be updated \_\_\_\_\_ times per year.  
(number)
- A committee of motivated club members has been appointed to develop interesting and relevant weekly club programs.
- A committee of motivated club members has been appointed to plan a variety of fellowship events.
- Monthly attendance figures will be reported to the district leadership by the \_\_\_\_\_ day of the following month.  
(number)

- Our club will use Member Access on the RI Web site to maintain RI club records.
- Membership changes will be reported to RI within \_\_\_\_\_ days.  
(number)
- Reports to RI, including the semiannual report, will be returned within \_\_\_\_\_ weeks of receipt.  
(number)
- Other (please describe):

**Action steps:**

---

**Our club would like assistance from the assistant governor or governor with the following:**

**What issues would you like to discuss with your governor or assistant governor during a visit to your club?**

Club President	Rotary Year	Assistant Governor
Date		Date



# Appendix 12: RI Resources for New Rotary Clubs

After a club is admitted as a member of Rotary International, the club's CDA representative sends the club secretary these RI publications, designed to support the elements of an effective club.

## **Sustain or increase membership base**

*New Member Orientation* (414-EN; 25 copies)

*Membership Development Resource Guide* (417-EN)

*Rotary Basics* (595-EN; 50 copies)

*What's Rotary?* (419-EN; one lot of 50)

*This Is Rotary* (001-EN; one lot of 50)

*How to Propose a New Member* (254-EN)

## **Implementing service projects**

*Communities in Action: A Guide to Effective Projects* (605A-EN)

*A Menu of Service Opportunities* (605B-EN)

*Presidential Citation Brochure* (900A-EN)

*Presidential Citation Certification Form* (900B-EN)

*Visual Identity Style Manual* (547-EN)

*RI Catalog* (019-EN)

## **Support for The Rotary Foundation**

*The Rotary Foundation Quick Reference Guide* (219-EN)

*Rotary Foundation Facts* (159-EN)

*Two Needs, Two Ways of Giving* (173-EN)

*Every Rotarian, Every Year Brochure* (957-EN)

## **Serving Rotary beyond the club level**

*Club Officers' Kit* (225-EN; includes *Club President's Manual*, *Club Committee Manual*, and *Club Secretary's Manual*)

*Official Directory* (007-ENP)

*Manual of Procedure* (035-EN)

*The ABCs of Rotary* (363-EN)

*RI Theme Folder* (900-EN)



This is the 2005 edition of *Organizing New Clubs: A Guide for District Governors and Special Representatives* (808-EN). 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 2007 Council on Legislation or the RI Board, override policy as stated in this publication.

***Comments?***

If you have questions or comments, submit them to:

Membership Development Division

Rotary International

One Rotary Center

1560 Sherman Avenue

Evanston, IL 60201-3698 USA

E-mail: [membership@rotaryintl.org](mailto:membership@rotaryintl.org)

Phone: 847-866-3000

Fax: 847-866-9446



# TAKE YOUR CLUB TO THE NEXT LEVEL

IMPLEMENT THE CLUB LEADERSHIP PLAN

— Develop a long-range plan

— Simplify the committee structure

— Involve all club members

— Find more information on [www.rotary.org](http://www.rotary.org)