

Organizing a New Club

Each year hundreds of new Rotary clubs are formed. Organizing a new Rotary club is a fundamental responsibility of the district governor. If you have interest or information about the viability of forming a new Rotary club, you are advised to consult with your district governor and their special representative. The forms for organizing a new club must be approved and signed by the district governor.

There are several documents that must be completed to organize a new Rotary club. These are listed below.

1. Instructions for completing the required forms

A step-by-step guide to completing the paperwork necessary to form a new club.

2. Organization of New Club Survey Form

Completed by the district governor and their designated surveyor, this survey is required and it is the first part of the process to form a new Rotary club.

3. New Club Sponsor Form

An existing Rotary club agrees to serve as a mentor and sponsor to the new club.

4. New Club Membership Application Form

Providing club and membership details, this form is required and it includes the charter list of members.

5. Additional resources for organizing a new Rotary club

Resources include a list of the most common mistakes made when filling out new club applications, Frequently Asked Questions about forming new clubs, and a sample new club news release.



INSTRUCTIONS FOR NEW ROTARY CLUB FORMS MEMBERSHIP IN ROTARY INTERNATIONAL

Step 1: Complete the Organization of New Club Survey (Extension Survey).

This survey assists the governor in determining if a community can support a Rotary club. Signed by the governor and the surveyor, it also provides information about possible sponsor clubs and the name of the new club special representative.

Step 2: Complete the New Club Sponsor Form (if applicable).

An existing Rotary club with a minimum of 25 members agrees to mentor, guide and sponsor a new Rotary club. Organizing a new club does not require a sponsor club, though it is highly recommended.

Step 3: Complete the New Club Application Form.

A new club commits to fulfilling its obligations as a member of Rotary International. The form includes a charter member list and signatures of the club president and secretary to verify compliance with RI constitutional documents and Board policies. The special representative and district governor also sign, endorsing the club's admission and verifying club compliance with policy. Accurate completion of this form avoids delays in processing (refer to Additional Points for Completing Forms for more details).

The following section descriptions follow the New Club Application Form in sequential order:

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 IX, section 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. (Standard Rotary Club Constitution, Article IX, section 4)

Club Constitution

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

Club Name

The official format for referring to a club is the "Rotary Club of *community, state/province/prefecture, country.*" (Standard Rotary Club Constitution, Article II)

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, R.J. Brazil
Club serving a part of a county	South Fulton County
County club showing meeting site	Haywood County (Canton)

Names for Additional Clubs

City neighborhood	Chania (Crete), Greece
Year chartered	Castlegar Sunrise 2000, BC, Canada
Civic nickname	Carlsbad (Cavern City)
Civic landmark	Nagoya Airport, Aichi, Japan
Person's name	Hilton Head Island-Van Land
Serving a shore area	Tampa Bay (Tampa)

(Note: "Tampa Bay" alone is not acceptable because it does not describe a community.)

Named for Meeting Times

Morning	Prospect Sunrise, S.A., Australia; Phoenix Sunrise; Charlotte Top-of-the-Week (Monday morning)
Noon	Sedona-Midday; Christiansburg-Blacksburg (Noon)
Evening	Hendersonville-Sunset; Leesburg (Sunset); Winter Park Evening

Locality Description

The form includes a written description of the club's locality, including geographical landmarks such as streets and rivers and/or major political boundary lines. Descriptions contain references to cities, townships, provinces and states, which are not likely to change. It is recommended to keep the club's locality description as simple as possible.

Magazine

Every Rotarian must subscribe to THE ROTARIAN or an official regional magazine. 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 club bylaws, the adopted club bylaws must be attached to the application.

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 on a monthly basis.

Club Fees and Dues

Clubs must have an admission fee of at least US\$25 and annual dues of US\$40, 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. At least one of the clubs must have a minimum of 25 members.

Special Representative

Rotary International requires current contact information for special representatives for 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.

Name

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

Gender

The RI Board and the 2001 Council on Legislation strongly encourages dual-gender Rotary clubs in order to properly reflect the business and professional life of the community.

Former Rotarian

“Former Rotarian” is any person who has been a member of a Rotary club. A Rotarian who is joining the new club resigns membership in another club by the time the new club is admitted. This information helps to verify a person’s qualifications and to keep records accurate.

Membership

Only active membership is listed on the charter form. The honorary membership list is maintained by the club.

Classification

Use of classification ensures that membership represents the business and professional life of the club’s locality.

A classification is determined by the activity or service rather than by 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).

The RI Board recommends that a classification be created to reflect any commercial, industrial, professional, or institutional activity sufficiently independent to determine its own policies and exercise responsibility, even though the financial control and the final determination of the financial policy of any two or more such activities may be vested in one corporate body or individual ownership.

For example, if a large university has three separate schools, each one sufficiently independent to determine its own policies, the club should establish a classification to cover the principal and recognized activity of each, such as Engineering Schools, Law Schools, and Medical Schools.

Name of Firm

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.

Executive Position

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; or
- Holds an important position in any worthy and recognized business or profession or any branch or agency thereof and have executive capacity with discretionary authority; or
- Has retired from any position listed above.

Addresses

This information verifies that a person is qualified for membership based on the new club's locality and may also be used for magazine mailings.

If you have any questions about whether a person is qualified to be included on the charter list or any other matter regarding the chartering of a new club, please contact your club and district administration representative for clarification.



**ORGANIZATION OF NEW CLUB SURVEY
(Extension Survey)
MEMBERSHIP IN ROTARY INTERNATIONAL**

Name of Locality: _____
(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:

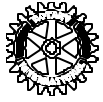
Other Service Organizations:

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):*

governor will forward the original to your club and district administration representative. A copy should be retained 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 _____ members (excluding honorary). (*A sponsor club must have a minimum of 25 members.*)

President's signature

Date

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 provisional club's 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

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 II: Club Name

Rotary Club of _____
(complete name, including community, state/ province/prefecture, country)

Article III: Locality Description *(please attach additional pages as needed)*

New Club Application Form

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 officers given on page 2 unless otherwise specified here).

Meetings

Weekly meeting:

_____ Day of week _____ Time

_____ Place *(include the complete address)*

Postal Codes: _____

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\$25 and annual dues of US\$40, 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

New Club Application Form

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 is:

Rotary club

Mailing address

E-mail

Phone

Fax

New Club Contact Information

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

Telephone: _____ Fax: _____

E-mail: _____

CHARTER LIST

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

CHARTER LIST ***MAKE SURE THESE MATCH**

Copy this page to complete a box for each member (minimum of 20 charter members).

Name: _____
Gender: <input type="checkbox"/> Female <input type="checkbox"/> Male Former Rotarian: <input type="checkbox"/> No <input type="checkbox"/> Yes
Classification _____
Name of Firm: _____
Executive Position: _____
Business Address: _____
Postal Codes: _____
Residence Address: _____
Postal Codes: _____
Residence Phone: _____ Business Phone: _____
E-mail: _____ Fax: _____



ADDITIONAL POINTS FOR ORGANIZING A NEW ROTARY CLUB

Common Mistakes in Completing Forms for Organizing New Clubs

Organization of New Club Survey (Extension Survey)

- The survey is received without the New Club Sponsor Form when the new club has a sponsor.
- Club name and full address of special representative are not included.

New Club Sponsor Form

Number of sponsor club members is not included (a minimum of 25 members in sponsor club is required).

New Club Application Form

- Signatures of sponsor club president and secretary are included instead of provisional club president and secretary.
- Name of president-elect is omitted. Even if it is the same as president, name should be reentered as the entry for president-elect.
- Description of locality as it appears in Article II of the club's constitution is omitted. (Please note that even if a locality is new, a description of the locality must be included. For example, city of ... , town of ... , that part of town ... bounded on east by ... , west by ..., north by ..., and south by ..., etc.)
- Suitable entry for magazine not marked.
- Full address, including the postal code of the meeting place, not mentioned.
- Admission fees in local currency do not equal US\$25 and/or annual dues in local currency do not equal US\$40.
- Mailing address of special representative does not include postal code.

Charter List

- Gender not marked.
- Former Rotarian not marked.
- Membership not marked.
- Executive position or title mentioned in place of classification.
- Name of Firm omitted (please note that if there is no name of firm, “Self-Employed” may be used).
- Executive position is omitted. When the member is the owner, proprietor, or partner, use these same terms for these lines.
- In some cases business address is omitted and in others residence address is omitted. Please clearly indicate if both addresses are the same.
- Postal code in business address/residential address omitted.
- Number of members in charter list does not match the number of members for which charter fees are paid.

Miscellaneous

- Name of the proposed club is same as a terminated club. In such cases, full details should be given.

Please note that in general, all entries in the forms should be completed. Wherever an entry is not applicable, it should be so indicated or the inapplicable text should be crossed out.

7 Frequently Asked Questions

Q. Is an Organization of New Club Survey (Extension Survey) necessary?

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

Q. Does a new club have to have a sponsor club?

A. No, but the RI Board strongly encourages sponsor clubs. A new club may have one or more sponsor clubs. At least one sponsor club must have a minimum of 25 members.

Q. Does the special representative have to belong to the sponsor club?

A. 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.

Q. Is there a minimum or maximum number for a charter list?

A. The minimum number is 20; there is no maximum.

Q. Are there any restrictions on classifications?

A. Yes. A club can have up to 5 or 10 percent of the active members, whichever is higher, in any one related field. For example, a charter list with 32 members would be limited to 5 members with classifications in education or finance. On the other hand, a charter list with 60 members can have up to 6 members (10%) who share the same classification.

Q. Is the classification "Real Estate Agent" acceptable?

A. 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.

Q. Can a member of a current Rotary club be on the charter list of a new club?

A. Yes. A member's resignation from a current club should be effective the date 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.

Q. Can a new club be permanently restricted to its meeting time and/or place?

A. 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.

Q. Are there any requirements concerning descriptions of locality?

A. Yes, a written description is required. It should be worded so that the members understand the local area that the club serves and draws members from.

Q. How can a new club avoid problems with its application?

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

Q. Is it just a formality for the Board to approve the admission of a Rotary club?

A. No, definitely not. The application documents are thoroughly scrutinized to ensure that they comply with RI constitutional documents and with Board policies. There have been instances when provisional Rotary clubs never became Rotary clubs.

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

A. No. The 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.

Q. Can any Rotarian organize a new Rotary club?

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

Appendix 2 *Sample News Release*



ROTARY CLUB OF [CITY]

Address
City, State, Province, Zip Code Country

TEL: XXX-XXX-XXXX
FAX: XXX-XXX-XXXX
WEB: www.rotary.org

FOR IMMEDIATE RELEASE

CONTACT: Name at phone number or
e-mail at email@emailaddress.com

DATE:

Rotary International Announces New Rotary Club in [City] [Club Brings Tradition of Service to Local Area]

CITY, DATE—Rotary International, the world’s oldest humanitarian service organization, is expanding into [City]. Local members received a charter to join the global association of Rotary International’s [30,000] clubs in [163] countries.

Rotary is an organization of [1.2 million] business and professional leaders who provide humanitarian service and help to build goodwill and peace in the world.

[Governor’s name] presented the club charter to [president’s name and professional title], the club’s president [Date]. Other officers are [vice president’s name and professional title, secretary’s name and professional title, and treasurer’s name and professional title].

Locally, the Rotary Club of [City] plans to [Describe local initiatives, possibly in list format.]

The Rotary club of [City] 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.