

# 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.



**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:

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**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

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