# STARTING A
# ROTARY CLUB

# NINE STEPS TO STARTING A ROTARY CLUB

**①  Identify a Locality for the New Club**

- Look for opportunities to start new Rotary clubs
- Research the characteristics of area clubs (general meeting times, professions and other groups that aren't participating, etc.)
- Contact the district governor and other leaders to get approval to start a club in intended area

**②  Get Organized**

- Find supporters, including a sponsor club
- Contact **Club and District Support (CDS) staff**

**③  Make a Communication Plan**

- Tailor your message to your audience
- Identify communication channels
- Contact prospective Rotarians you know about
- Consult local leaders to identify other prospective members

**④  Hold Informational Meetings**

- Plan your agenda and prepare your materials
- Invite prospective members
- Market informational meetings through traditional and social media
- Collect contact information from attendees who are interested in being part of the new club

**⑤  Recruit Charter Members**

- Sign up regular attendees to your informational meetings as charter members
- Continue to invite prospective members
- Consider your online membership leads

**⑥  Hold Organizational Meetings**

- Consider ways to collaborate with another club
- Reach a total of at least 20 regular attendees
- Choose club officers
- Select a club name and meeting location
- Decide how and where you'll meet

**⑦  Submit the New Club Application**

- Ask your district governor to sign the **new club application form** and send it to **Club and District Support staff**

**⑧  Celebrate the Charter and Publicize the Club**

- Celebrate with your community and with current and prospective Rotarians in a way that fits the culture of the new club

**⑨  Continue Developing the New Club**

- Continue to bring in new members
- Support members and officers as they learn about Rotary
- Provide advice and support on governance, projects, and administrative matters

# WHY START A ROTARY CLUB?

If you haven't been a member of a Rotary club, or haven't seen one in action in your community, you have a unique opportunity before you. By founding a new Rotary club, you can:

- → Engage with your community differently

- → Make an impact in the lives of others

- → Connect with leaders in your area and around the world

- → Set out with others to build something together for yourselves and the community, shaping the club from the start — forming its culture, establishing its unique traditions, setting its service priorities, and making it your own

If you're already a member of a Rotary club, you know that new clubs are needed to increase our membership. They also bring other benefits to you, the community, and Rotary. Starting a club is an ideal way to:

- → Increase the diversity of the clubs in your area

- → Explore different forms of club organization and club life in your district

- → Pursue new project possibilities in your district

- → Meet more leaders in the area and hear their fresh ideas

This guide describes the process of establishing a new club, from the initial idea to the charter celebration and beyond. You can use it to start a Rotary club whether you're a nonmember interested in bringing Rotary to your community, a Rotarian who wants to start a new club, or a district leader who wishes to increase district membership.

Rotary will need to grow and evolve in order to continue to meet community needs. When you charter a new club, you increase Rotary's capacity to improve lives in communities around the world. Thank you for helping to make this happen.

"[By] starting a new club, ... people can bring Rotary into their lives the way it works for them."

— Past RI President Ron D. Burton

"Try chartering some new clubs with energetic fresh thinkers and set an example of what is possible."

— Past RI President Kalyan Banerjee

# WHAT YOU'LL NEED TO START

Starting a new club brings community leaders and experts together to exchange ideas and take action to meet community needs. District governors often appoint a new club adviser and collaborate with Rotary International's **Club and District Support staff** during the process. If you don't know who is the district governor for your area, contact Club and District Support.

### ➕ A NEW ROTARY CLUB WILL NEED:

**A new club adviser**
Typically, the district governor appoints a new club adviser or works with the district's new club development committee.

> *What makes the difference?* Commitment and experience. The new club adviser champions the effort from start to finish, and the adviser's involvement after the club gets its charter is critical to its success in its first years.

**A sponsor club**
Having a sponsor is strongly recommended but isn't required.

> *What makes the difference?* The support of a designated sponsor club can increase the success rate of new clubs by as much as 10 percent.

**Charter members**
The minimum number of charter members is 20. However, it's best to start a club with at least 25 members.

> *What makes the difference?* More charter members. Our records indicate that the more members a club starts with, the more likely it is to succeed. Increasing the number of charter members by just five significantly reduces the risk that a club will be terminated.

➕ If you don't have enough members to start a Rotary club, you can start a satellite club instead, with the goal of chartering a Rotary club once you have at least 20 members. Find the **Satellite Club Application** on Rotary.org.

# STARTING A ROTARY CLUB

Rotary clubs are formed in numerous ways. The following steps make up the basic process used to charter a sustainable, successful new club. Adapt them as needed so that they're relevant and appropriate for your community and your culture.

## **1** IDENTIFY A LOCALITY FOR THE NEW CLUB

Make a list of communities in your district that could benefit from having a new club. Include communities that have no Rotary clubs and those that have needs that additional vibrant clubs could address.

Start by looking at a map of your district. Mark the locations of all the clubs in the district, and see what patterns emerge. If the map already has many clubs, check their meeting times and look for opportunities to add clubs that meet at different times. Use Rotary's **Club Finder** or the **Rotary Club Locator mobile app**.

### In general, look for:

- Communities with recognized needs

- A population of at least 1,000-3,000 (This number may vary by region.)

- Groups of people and professions that currently aren't being recruited

- Rotary alumni (former Rotaract and RYLA participants, vocational training team members, Rotary Scholars, etc.)

- Young adults, women, members of ethnic minorities, and other underrepresented groups

**+**

*Locality* refers to the geographical area a club is in, and the club *location* is where it meets.

## 2 GET ORGANIZED

Once you choose an area for the new Rotary club, you'll need to identify the key people, including a new club adviser, who will be involved and bring them together to learn about their roles and responsibilities. Let the district governor know you would like to start a club in this area, and get their support.

### Identify supporters

Starting a club is a large endeavor and should be undertaken by several dedicated people. The main players are:

- The district governor — Appoints the new club adviser and approves the new club application

- The district new club development committee chair — Identifies opportunities to start new clubs in the district, plans and implements the district's new club strategy, guides clubs during their first two years, trains new club officers, and motivates new clubs and supports their growth and development

- The new club adviser — Guides and oversees the creation of one specific new club; frequently is a member of the sponsor club; is instrumental in creating the communication plan; initiates informational meetings

- The sponsor Rotary club — Works closely with the new club's officers and mentors the club during its first year

> If you find that starting a Rotary club isn't going to be feasible, consider an alternative, such as a **satellite club**, a **Rotaract** or **Interact** club, or a **Rotary Community Corps**. All of these are considered to be part of the family of Rotary. Depending on the ages and other characteristics of the people who are interested, another type of club may be a more appropriate option.

A great resource for anyone establishing a Rotary club is the office that supports your district. Rotary's **Club and District Support staff** are trusted advisers who can help, from initial planning to implementation of your plan. They'll check the proposed name of the new club, advise you on each step of the process, review the new club application, and recommend approval to Rotary's Board of Directors.

You may also want to take the New Club Formation course at **learn.rotary.org**.

## 3 MAKE A COMMUNICATION PLAN

How will you let prospective members know about the club? This is the first step in finding members.

First, create a clear, simple message that communicates what you're offering and how prospective members would benefit.

> Find flier templates and other **promotional resources** in Rotary's Brand Center.

Create a Rotary-branded flier that includes the following information:

- What's happening? A Rotary club is forming in our community

- Who can join? Professionals in the community

- What will they do? Put their unique expertise and perspectives to use to solve community problems

- Why should I join? To make a difference in your community and meet other professionals in the area

- And if I'm interested? Come to our informational meeting [add details]

Next, find ways to get the message out.
Here are six ideas:

- Post an announcement on social media

- Have your flier printed in local newspapers, trade association publications, and professional directories

- Ask local radio stations to make an announcement

- Email local business leaders and promote the club as a leadership development opportunity for employees

- Talk to professional and community leaders and ask them to spread the word among your target audiences (i.e., community groups, trade associations, and other professional groups)

- Leave fliers in waiting rooms and office lobbies and post them around your community

Identifying the needs of the community may help you target local organizations and experts that may be able to address them. If you aren't sure what the community's needs are, talk with knowledgeable leaders there.

Once you get the word out, you'll need to plan your informational meeting, where you'll elaborate on the vision you have for the club, meeting details, and how attendees can benefit from joining.

## 4 HOLD INFORMATIONAL MEETINGS

Informational meetings are where prospective members meet for the first time to find out more about Rotary and the new club. Many people who have said they're interested in joining won't attend the meeting. Don't be discouraged.

Here are some tips on preparing for your meeting:

- Have a sign-up sheet to collect prospective member names and contact information

- Decide who will be responsible for setting up the meeting, leading it, and distributing materials

- Start by inviting people (ask club members to invite prospective members in person or using tools like social media, phone calls, emails, and ads)

- Order materials to distribute at the meeting, such as:

  - **Impact Begins With You** (prospective member brochure)

  - **Connect for Good** — Inspires members to get involved

- Consider showing the **Discover Rotary PowerPoint presentation** to highlight the organization's values and the benefits it offers members, and supplementing your presentation with **Rotary videos** or other materials as appropriate

- Make an agenda

For more details about how to conduct an informational meeting, see **Informational Meetings**.

## 5 RECRUIT CHARTER MEMBERS

You need 20 members to start a club. You may have enough after your informational meeting, but if you need more members, you'll have to continue to recruit them.

The criteria for being a Rotarian are simple: Be an adult who demonstrates good character, integrity, and leadership; have a good reputation within your business or profession and community; and be willing to serve in the community or around the world. How will you find prospective members who fit this description? Business, professional, and community leaders can be good prospects.

Diversity of membership is critical. It will help make the club sustainable for the long term, because including members with diverse perspectives and backgrounds keeps the club relevant to the community.

If you need help finding prospective members:

- Hold additional informational meetings.

- Check your **online membership leads**. (Club and district leaders have access to these, which have information from people who have expressed interest in joining a club through Rotary.org.)

- Ask established clubs for suggestions.

- Try the exercise in **Finding New Club Members**.

- Revisit your outreach efforts from step 3.

- Contact your district's Rotary alumni.

- Visit local businesses and offices to talk to business owners or managers about their interest in joining. Ask if you may speak with their employees about joining.

- Find out who has helped with community projects or played a role in organizing social or cultural events.

- Consider professionals from different fields and industries to increase the club's capacity to serve its community.

Strive to ensure that the new club's members offer diverse skills, talents, and experiences and include people of different ethnicities, ages, and cultures, as well as a good gender balance.

There is only one Rotarian that was never asked to join Rotary, our founder Paul Harris. The No. 1 reason people do not join Rotary clubs is that they are never asked.

## 6 HOLD ORGANIZATIONAL MEETINGS

Hold an organizational meeting when you have 8-10 people interested in joining the new club. The preparation for this meeting is the same as the informational meeting, including finding someone to run the meeting and making an agenda, handouts, and a sign-up sheet. The purpose of this meeting is to elect club officers, reach agreement on a regular meeting time, and plan for the club's first project. The organizational meeting can also be a good time to decide where the club will meet.

For information on how to select the best possible meeting location for the new club, consult **Club Meetings**. For more on how to conduct an organizational meeting, see **Organizational Meetings** and Rotary's **promotional resources**.

Continue recruiting charter members and holding meetings until you have 20 committed members and all of the information you need for the New Rotary Club Application.

## 7 SUBMIT THE NEW CLUB APPLICATION

Complete the New Rotary Club Application and give it to the governor of the district. The district governor then verifies that the application is correct and complete by signing it and forwarding it to the district's **Club and District Support staff**.

The **new club application form** is online at Rotary.org and at the end of this guide.

Be sure to keep a copy of the application in the club's files for historical purposes.

> ➕
>
> Once you submit the application, a Club and District Support staff member will review it and contact you with any questions. Processing time varies. If you have questions, contact your Club and District Support representative.

## 8 CELEBRATE THE CHARTER AND PUBLICIZE THE CLUB

It's essential to celebrate the charter of a new club. Celebrations bring everyone together to commemorate a momentous event. They solidify a group's identity and strengthen the members' sense of belonging.

A charter celebration is also an opportunity to hold a memorable fellowship event and generate publicity. You can use it to introduce the club to the community, recognize its leadership, and set the stage for the club's active participation in its community.

How you celebrate is up to the club but generally reflects the club's culture. For ideas on how to plan a successful new club charter celebration, consult **Club Charter Celebrations**.

## 9 CONTINUE DEVELOPING THE NEW CLUB

It will take some time for a new club to develop its own culture, character, and traditions, and for new members to learn how to run a club successfully. New members can learn more about Rotary by familiarizing themselves with **Rotary Basics**, the **Learning Center**, and **Membership Assessment Tools**.

Members of the sponsor club can support the new club by sharing their Rotary knowledge, helping to train club leaders, offering new member orientation (see **Introducing New Members to Rotary**), advising on club governance, volunteering to work on the club's service projects, recommending speakers for meetings, and attending the new club's events. You can find more information about sponsor club responsibilities and the mentoring relationship in **Sponsor Clubs** and chapter 5 of **Strengthening Your Membership: Creating Your Membership Development Plan**.

# NEW CLUB RESOURCES

**FIND MORE DETAILED INFORMATION ABOUT THE PROCESS OF STARTING A ROTARY CLUB:**

- → **New Rotary Club Application**
- → **Sponsor Clubs**
- → **Informational Meetings**
- → **Organizational Meetings**
- → **Club Meetings**
- → **Club Charter Celebrations**
- → **Charter List Form**

**FIND MORE INFORMATION USEFUL TO NEW CLUBS:**

### Lead Your Club series
Manuals for club president, secretary, treasurer, and committee chairs. Find resources and information on how to strengthen your club's membership.

### Rotary Club Health Check
A guide that helps you identify areas your club can work on to become even healthier. Offers suggestions and further resources for addressing growth areas.

### How to Create a My Rotary Account
A quick, step-by-step guide that helps you register for a My Rotary account so you can get more Rotary resources online.

### Rotary Club Central
The site where clubs set goals and track their progress toward them.

### rotary.org/membership
Find resources for increasing your club membership and enhancing the member experience.

### Introducing New Members to Rotary: An Orientation Guide
A guide that club leaders can use to help new members learn more about Rotary, the benefits of membership, and how they can get involved.

### Rotary Basics
Learn about Rotary's history, values, and structure and the many ways to get involved. Includes frequently used abbreviations and a glossary.

### Rotary Foundation Reference Guide
Learn about The Rotary Foundation's programs, funds, grants, and awards. Includes information on PolioPlus, peace fellowships, global and district grants, alumni resources, and more.

### The Learning Center
Rotary's Learning Center offers online courses on various topics, including club role training, forming new clubs, new club mentors, and satellite clubs.

### The Brand Center
Find Rotary logos, brand guidelines, membership certificates, club brochure templates, and more.

### Rotary Global Rewards
Get discounts on a variety of products and services as a Rotary member.

# NEW ROTARY CLUB APPLICATION

Congratulations and thank you for your time and effort in organizing your club!

To avoid processing delays, supply all of the requested information. Include an email address for each member and a separate email address for the club. Email addresses are a vital part of Rotary's communication strategy.

- Note that the information you submit is subject to Rotary's privacy policy.
- Ask your district governor to sign the application, verifying that the information is accurate and complete.
- Send the completed application to your district's Club and District Support staff.
- If you have missing information, Club and District Support staff will contact you.

## CLUB NAME

*The club's name should be easy to find on a map or through an internet search, to help Rotarians and others who want to visit.*

The name of this organization shall be the Rotary Club of

_____
List the club name, including community, state/province/prefecture, and country or geographical area

## CLUB INFORMATION

Club email _____
(Cannot be the same as any club member's email address)

District number _____

District governor's name _____

## NEW CLUB ADVISER

Title (Mr., Ms., Mrs., Dr., Rev., etc.) _____

First name _____ Middle name _____ Family name _____

Suffix (Jr., Sr., III, etc.) _____

Member, Rotary Club of _____
List club's official name, including country

Email _____ Phone _____

## NAME OF SPONSOR CLUB ☐ **No sponsor club**

_____

## OFFICER NAMES

**President** _____

☐ Officer will continue in this role next Rotary year, starting 1 July

**Secretary** _____

☐ Officer will continue in this role next Rotary year, starting 1 July

**President-elect** _____

☐ Officer will continue in this role next Rotary year, starting 1 July

**Treasurer** _____

☐ Officer will continue in this role next Rotary year, starting 1 July

**Membership chair** _____

☐ Officer will continue in this role next Rotary year, starting 1 July

**Rotary Foundation chair** _____

☐ Officer will continue in this role next Rotary year, starting 1 July

## CLUB CHARTER FEE

Please attach check or proof of payment.

Number of charter members _____ x US$15 = _____

Currency in which the charter fee has been or will be paid, and total amount _____

Charter fee is being paid by:

☐ Check*   ☐ Money order   ☐ Fiscal agent   ☐ Bank transfer to an RI account outside the U.S.

☐ Other _____

*If paying by check from another country, please have the check drafted through a U.S. bank. If you have any questions about payments, contact Club and District Support staff.

## ROTARY MAGAZINES

Please indicate each charter member's magazine choice on the charter member list. Here, select one option for the club as a whole:

☐ All of our members will subscribe to The Rotarian.

    ☐ Total number of subscriptions to The Rotarian print edition _____

    ☐ Total number of subscriptions to The Rotarian digital edition _____
        An email address is needed for each member requesting a digital magazine.

☐ All of our members will subscribe to The Rotarian or the following certified Rotary regional magazine:

_____

☐ Members are not required to subscribe to a Rotary magazine because the club is in Afghanistan, Albania, Azerbaijan, Bosnia-Herzegovina, Cambodia, Croatia, Estonia, Greece, Hungary, Indonesia, Kazakhstan, Kosovo, Latvia, Lithuania, Moldova, Mongolia, Montenegro, Romania, Slovenia, or Tajikistan.

## CLUB MEETING (ALL CLUBS MEET AT LEAST TWICE A MONTH.)

Day of meeting _____ Meeting time _____

Club website address (if available) _____

If your club meets in person, list the name and address of the meeting place, including postal code

_____

_____

## CERTIFICATION

Club president and secretary signatures verify that this club is organized in accordance with Rotary's policies and constitutional documents and that the information in this application is accurate and will be kept on file by the club.

_____
List club name, including community, state/province/prefecture, country/geographical  area

applies for Rotary membership. The club officers' signatures below confirm that the club:

1. Will abide by the RI Constitution and RI Bylaws

2. Has adopted Rotary's Standard Rotary Club Constitution as its own and will abide by its provisions

3. Will always have bylaws that are in harmony with Rotary's constitutional documents, including the Standard Rotary Club Constitution

4. Will not become a member of, or assume obligations of membership in, any organization other than Rotary

5. Will meet the obligations of a member club of Rotary

Club president's signature _____ Date _____

Club secretary's signature _____ Date _____

As governor of the district, I endorse this club's application for admission to Rotary and certify that this application meets the requirements in Rotary's constitutional documents and the Rotary Code of Policies.

I confirm that these statements are true and correct:

All members of the proposed new Rotary club have participated in an appropriate orientation and education program under the guidance of district leaders and members of the sponsor Rotary club, if it has one.

The club has set an annual fee to cover its financial obligations.

The club has a well-balanced membership in compliance with Article 5, Section 2, of the RI Constitution: "Each club shall have a well-balanced membership in which no one business, profession, or type of community service predominates."

The club is fully aware that it is not entitled to impose any limitations on membership based on gender, race, creed, age, and sexual orientation.

All current or former Rotarians joining this new club have provided written proof from their current and previous clubs that all of their previous club debts have been paid.

District governor's signature _____ District _____

## CHARTER LIST

Attached is a list of charter members, as required by the RI Board of Directors. Clubs may submit their charter member data in an Excel file or a Word document.

## CHARTER MEMBER

Clubs have a minimum of 20 charter members. Complete the new club charter list (Excel file) or fill out this page for each charter member. Please type or print.

Title (Mr., Ms., Mrs., Dr., Rev., etc.) _____

Family name _____

First name _____ Middle name _____

Suffix (Jr., Sr., III, etc.) _____

Gender:  ☐ Male  ☐ Female

Date of birth (List day, month, and year in that order: DD-MM-YYYY) _____

Are you a former Rotarian or a current member of another Rotary club?  ☐ No  ☐ **Yes**

    **If yes,** RI membership ID number _____

        Name of former/current club _____

*Current members should not officially terminate their membership in their current clubs. Their changes will be recorded when Rotary admits the new club.*

Are you a Rotary alumnus/alumnae?  ☐ No  ☐ Yes

*Alumni are former participants of Interact, Rotaract, Youth Exchange, RYLA, Rotary Peace Fellowships, Rotary Scholarships, vocational training teams, and Group Study Exchange.*

Email _____

Preferred phone (including country, city, and area codes) _____

Alternate phone _____

Preferred mailing address (check one):  ☐ Residence  ☐ Business  ☐ Other  _____

Alternate address (complete only if mailing address is a P.O. box):  ☐ Residence  ☐ Business  ☐ Other

Magazine — Select one:  ☐ The Rotarian (print)  ☐ The Rotarian (digital)  ☐ Rotary regional magazine

**For use in verification of compliance with Rotary policy:**

Job title _____

Name of your business or organization _____

Classification _____