



# New Club Initiative

District 6450

Rev. 1/12/2019



**Rotary**

District 6450  
Birthplace of Rotary

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## District 6450 - New Club Initiative

### Basic questions to consider:

#### The basic club make-up

- Develop a strong core team to work together to build your club.
- Who will be your members? Work Colleagues - Local Professionals - Local Politicians - Young Professionals - Retirees
- Compile a potential membership database from your team's contacts and desired members. Consider individuals you might not know, but would like to. Consider diverse candidates for the coalition/ potential club members.
- Are there former Rotarians in the area who may want to join a new club?

#### Developing your club identity

- What kind of club will you be? Breakfast, lunch, evening?
- What day do you want your club to meet?
- Are there opportunities to draw members by differing meeting times and dates from other nearby clubs?
- Do you want to focus on local, national, international projects and causes?
- Do you want to start your own programs for areas of concern you would like to focus on, or tap into programs run by other club's or organizations?



#### Budgeting

- Create a budget starting with district and international dues. (Club dues can be decided at a later date if unsure about expenses).
- Consider pre-collection of dues in cash, or uncashed checks to confirm those participating are serious.

#### Communications/ Marketing

- Before setting up social media and marketing materials, contact Rotary International and confirm approval of desired club name.
- Encourage potential members to provide their contact information and add them to marketing distribution lists.
- Consider an e-newsletter to keep future and potential members with up-to-date information about the new club application/ club status.
- Set-up a facebook/instagram/twitter account and invite friends to like and follow the page. \*Page content should be regularly updated. Assign this role to an individual within your core team.
- Consider a meetup page to attract other individuals from the community outside.
- Once registered on Rotary.org, visit the brand center where you can download official logos, photographs, and brand standard guidelines for help in developing your marketing materials.
- Consider setting up an email account which all core members have access. Google is one service which provides free email, as well as on-line data storage and word processing, to allow collaboration among core members.
- Consider setting up a google voice number so individuals have a general number to reach core members.



**District 6450 - New Club Initiative**
**Checklist**

- ☐ -Receive Approval from RI of Club Name
- ☐ -Complete Government Documents (see Government section)
- ☐ -Open Bank Account (consider a free checking option)
- ☐ -Set-up the Charter Night and notify district of date. Personally invite nearby clubs (AG has list)
- ☐ -Invite your assistant governor (AG) to a club meeting
- ☐ -If there is a club coalition of nearby clubs, attend a meeting. Your AG will have this information.

**Rotary Websites**
**Rotary.org**

Rotary.org is the official Rotary International Website. This is not a district website, and the information contained on this website is not visible by District 6450 officials (see club express explanation below).

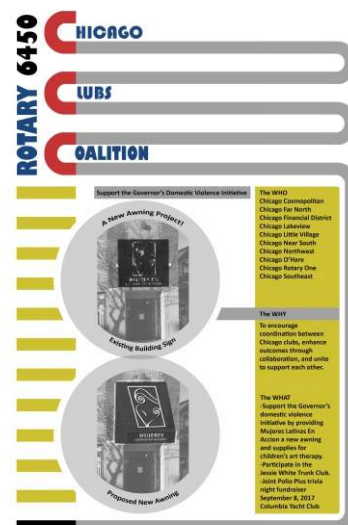
- ☐ -Visit [www.rotary.org](http://www.rotary.org) and create a login.
- ☐ -Request that all club officers create a login with [www.rotary.org](http://www.rotary.org) as well.
- ☐ -Enter names of current club officers in the "my rotary" section of the website.
- ☐ -Rotary International requires all clubs to provide club goals (metrics) which help to guide the club during the year. Enter your club goals in "myrotary", under the "club central" section.
- ☐ -Ask all of your club members to create a login with rotary.org for access to Rotary International content such as the brand center, inspirational stories, the Rotary Foundation, etc...

**District 6450 Website**

District 6450 maintains a website that includes district contacts, support, events, and messages from district leadership. The website is hosted by club express. A club express website is available free to all rotary clubs within the district (see Club Express section of this guide). Club member contact information entered in the local club's club express site is automatically shared with the district's website; the district website brings all club's data together. Club president's are encouraged to visit the district website frequently for updates on district events and messages which can be shared with club members.

Specific items to review and complete on the district website:

- ☐ -Visit [www.rotary6450.org](http://www.rotary6450.org) and select Training – President Elect – to see all the important files, dates, etc.
- Register the President Elect for PETS (mandatory President Elect Training) (beginning January 1)
- ☐ -Visit [www.rotary6450.org](http://www.rotary6450.org) and select Club Support – Secretary/Treasurer – to develop an understanding of Rotary International and District 6450 Club Dues.
- ☐ -Explain to your members your club's fee structure and when are fee payments due; assure you set a club dues amount that covers the Club Dues to Rotary International and District 6450, as well as anticipated club operating expenses.
- ☐ -Encourage club members to visit the District Web site and participate in training and district activities such as the One Rotary Summit



Example of a local club coalition. These coalitions share information, create joint social, and volunteer events, and sometimes fundraise for a specific event.

## District 6450 - New Club Initiative

### ClubExpress

District 6450 maintains an agreement with a web management system called ClubExpress. This is free to all clubs in the district. This system should be used to create a website for use by your club. The information you add to the database of your club's ClubExpress website will be viewable by District 6450 officials, such as the name and contact information of your members. You are encouraged to assist each of your members to create a log-in and to provide their contact and business information. The primary method of reaching your members is through this database, so your ClubExpress members data should be kept updated.

#### Setting up a ClubExpress website:

- ☐ -Contact District Office at [office@rotary6450.org](mailto:office@rotary6450.org) to get instructions for setting up a 'trial' website on the district sponsored ClubExpress web management system.
- ☐ -Once trial information is set up, alert the district office, who will have ClubExpress 'connect' your club's new website to the district system.

#### Adding Members:

- ☐ -One or more of your club members should be made an administrator of your ClubExpress website which provides access to the many included tools.
- ☐ -Each club member should be added to the Member Manager found under the Control Panel, "People" section of the ClubExpress website.
- ☐ -After your member's information is added (including email address), and email will be sent to them allowing them to complete their log-in and password for the ClubExpress website. This will allow them to update their member information, including adding business information, and a photograph.

#### Suggested Information to Include

When individuals search for your club on the internet, they may find your ClubExpress website. It is recommended that you indicate your contact and meeting information on this website so individuals know how to find your club. The website has an extensive calendaring tool which includes options for paid and non-paid event registration. Your club's communication director should keep the calendar updated with your events. If you meet regularly, you can create a repeating event so your meetings will always show up on the calendar.

The ClubExpress website is your connection to the District and to the world. It is an important part of the branding of your club, and can be a key tool to managing your club's membership databases, calendaring, invoicing, etc...

If you need help with ClubExpress, the district can provide simple support. For more complex needs, ClubExpress offers a free customer support service to answer your questions.

**District 6450 - New Club Initiative**

**Within Sixty Days of Charter:**

**Government Resources**

Step 1) Complete your club's constitution & bylaws.

Step 2) Register the name with the State of Illinois - Secretary of States Office

Step 3) Apply with the Internal Revenue Service for an FEIN (Federal Employment Identification Number)

Step 4) Within 60 days of the date the club becomes a legal entity (date of articles of constitution approved), notify the IRS of your status as a 501(c)4 by submitting Form 8976.

Step 5) Send a copy of the notice from the IRS confirming your EIN to your club/ district support representative. It is also required to include a notice to confirm that your club wishes to be included in Ri's 501(c)4 group exemption ruling.

**Banking Resources**

Step 1) Gather your documents of incorporation, by-laws and articles of incorporation, and FEIN.

Step 2) Visit your preferred bank and obtain application materials. It is likely you will need the social security numbers, contact information, and signatures on a signature card of all executive board members that will have access to the bank account.

Step 3) It is likely a "Banking Certification Beneficial Owners" document will also need to be signed.

**Websites that may be helpful:**

**Information about applying for 501c4 status:**

<https://www.irs.gov/charities-non-profits/application-for-recognition-of-exemption-1>

**State Information about starting a charitable organization:**

<http://www.illinoisattorneygeneral.gov/charities/forming.html>

**Illinois Website Forms for starting a not-for-profit:**

[http://www.cyberdriveillinois.com/publications/business\\_services/nfp.html](http://www.cyberdriveillinois.com/publications/business_services/nfp.html)



## Rotary International Key Contacts - Club and District Support

## YOUR KEY CONTACT – CLUB AND DISTRICT SUPPORT (CDS)

[www.rotary.org/cds](http://www.rotary.org/cds)

Provides personalized service, training, and regional guidance on

-  Rotary Resources and Services
-  Administrative Procedures
-  Board Policy and Rotary Constitutional Documents
-  Navigating [MyRotary.org](http://MyRotary.org) and Conducting Rotary Business Online



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## **Illinois Secretary of State - A Guide for Organizing NFP Corp**

# **A GUIDE FOR ORGANIZING NOT-FOR-PROFIT CORPORATIONS**

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**Illinois General Not-For-Profit Act of 1986,  
Illinois Compiled Statutes, 1992, Chapter 805, Act 105.**

# ARTICLES OF INCORPORATION

The Articles of Incorporation is a legal document through which a corporation is formed. This document is sometimes referred to as the “charter.” Regardless of your future tax-exempt status, **you must complete and submit two (2) identical copies of the Articles of Incorporation, Form NP-102.10, with at least one copy being the original.** All the interrogatories must be answered. Please type or print all responses.

## TAX-EXEMPT STATUS

**NOT ALL NOT-FOR-PROFIT CORPORATIONS ARE TAX EXEMPT.** Before you take any action, you should decide whether you wish to apply for federal income tax-exempt status (e.g., *501(c) (3) status*). Only certain kinds of charities, schools, churches, research institutes, clubs, etc. fall into that category. The words “athletic,” “benevolent,” “eleemosynary,” and “social” are not acceptable as purposes if a corporation is going to apply for 501(c) (3) status.

To find out if your corporation may qualify for a tax break, obtain and read IRS Publication 557 — How to Apply for and Retain Exempt Status for Your Organization. An organization does not have to be incorporated to apply for exempt status.

Should you decide to apply you will use either Form 1023 or Form 1024. However, you must be incorporated before the IRS will consider your application as a Not-for-Profit Corporation. Incorporation does not guarantee federal tax exemption, but if you wish to apply for that status your Articles of Incorporation may have to be written with the IRS regulations in mind.

## ARTICLES OF INCORPORATION REQUIREMENTS

### Corporate Name

#### (a) Restrictions

- (1) You may choose any name as long as it is distinguishable from the name of an existing Illinois corporation, a foreign corporation authorized to conduct affairs in Illinois, an existing Illinois Limited Liability Company (LLC) or a foreign LLC registered in Illinois or a name the exclusive right to which is currently reserved.
- (2) No name shall contain the words “*regular democrat*,” “*regular democratic*,” “*regular republican*,” “*democrat*,” “*democratic*,” “*republican*,” or the name of any other established political party, unless consent is given by the State Central Committee of such established political party.
- (3) The name must end with the letters NFP if the corporate name contains any word or phrase that indicates or implies that the corporation is organized for any purpose other than a purpose for which corporations may be organized under this Act.

(b) **Name Check**

You may find out if a name is available by writing or calling the Secretary of State's office in Springfield at 217-782-9520. A preliminary check also may be done on the Secretary of State's website at *www.cyberdriveillinois.com*. Include a brief description of the corporate purpose and be prepared with alternate choices of names.

(c) **Name Reservation**

You may reserve a name, if available, for a period of 90 days for a \$25 fee. You must make a written request, listing the name and a brief description of the corporate purpose. You may also use Form NFP-104.10. Name reservations are renewable by repeating this procedure.

## **Registered Agent and Office**

(a) **Purpose**

The purpose of requiring each corporation to maintain a registered agent and a registered office in Illinois is to provide a public record of the name of a person upon whom service of process against the corporation may be made, and of the place where such person may be found. This person also is the one to whom official correspondence from the Secretary of State is sent.

(b) **Qualifications**

(1) The registered agent must be:

(i) A natural person, resident in Illinois  
OR

(ii) A corporation with a purpose clause that permits it to be the agent for other corporations, with an office in Illinois;

(2) The registered office must be in Illinois and must be a street or road address, not just a P.O. Box number.

(c) **Changes**

Any change in either the agent or the office must be reported as soon as you know of the change. Prompt reporting of changes is important so that correspondence will not be delayed or lost. Form NFP-105.10 is used to report changes.

## **Duration**

The duration is the period of time you plan to be incorporated. The duration is perpetual, unless otherwise stated in the Articles of Incorporation.

## **Purpose**

(a) **Generally**

The purpose is a statement of the type of function or character for which the corporation is formed. Illinois requires this statement to be a narrow or specific purpose and will not accept a purpose that is too broad, general or vague.

(b) **Allowable Purposes**

Not-for-profit corporations may be organized for any one or more of the following or similar purposes:

- |                 |                                      |
|-----------------|--------------------------------------|
| 1) Charitable   | 10) Literary                         |
| 2) Benevolent   | 11) Athletic                         |
| 3) Eleemosynary | 12) Scientific                       |
| 4) Educational  | 13) Research                         |
| 5) Civic        | 14) Agricultural                     |
| 6) Patriotic    | 15) Horticultural                    |
| 7) Political    | 16) Soil improvement                 |
| 8) Religious    | 17) Crop improvement                 |
| 9) Social       | 18) Livestock or poultry improvement |
- 
- 19) Professional, commercial, industrial or trade association
  - 20) Promoting the development, establishment or expansion of industries
  - 21) Electrification on a cooperative basis
  - 22) Telephone service on a mutual or cooperative basis
  - 23) Ownership and operation of water supply facilities for drinking and general domestic use on a mutual or cooperative basis
  - 24) Ownership or administration of residential property on a cooperative basis
  - 25) Administration and operation of property owned on a condominium basis or by a homeowner association
  - 26) Administration and operation of an organization on a cooperative basis producing or providing goods, services or facilities primarily for the benefit of members who are consumers of such goods, services or facilities
  - 27) Operation of a community mental health board or center organized pursuant to the Community Mental Health Act for the purpose of providing direct patient services
  - 28) Provision of debt management services as authorized by the Debt Management Service Act
  - 29) Promotion, operation and administration of a ridesharing arrangement as defined in Section 1-176.1 of the *Illinois Vehicle Code*
  - 30) Administration and operation of an organization for the purpose of assisting low-income consumers in the acquisition of utility and telephone services
  - 31) Any purpose permitted to be exempt from taxation under Section 501(c) or 501(d) of the U.S. Internal Revenue Code, as now in or hereafter amended
  - 32) Any purpose that would qualify for tax-deductible gifts under the Section 170(c) of the U.S. Internal Revenue Code, as now or hereafter amended (Any such purpose is deemed to be charitable under subsection (a)(1) of this Section.)
  - 33) Furnishing natural gas on a cooperative basis
  - 34) Ownership and operation of agriculture-based biogas (anaerobic digester) systems on a cooperative basis including the marketing

and sale of products produced from these, including but not limited to methane gas, electricity, and compost.

(c) **Specifics**

After prefacing or confining the purpose, a more detailed or specific purpose may be listed. Simple, everyday language can be used. For example: "To find homes for stray dogs and cats," "To send needy inner city children to summer camp," or "To form a neighborhood block club." DO NOT use any language that may indicate or imply a business purpose as such is not a proper not-for-profit purpose.

A corporation that is to function as a club, as defined in Section 1-3-24 of the Liquor Control Act of 1934, must insert in its purpose clause the following statement: **the corporation will comply with the state and local laws and ordinances relating to alcoholic liquors.** State whether the corporation is a condominium association as established under the Condominium Property Act, a cooperative housing corporation defined in Section 216 of the Internal Revenue Code of 1954, or a homeowner association, which administers a common-interest community as defined in subsection (c) of Section 9-102 of the Code of Civil Procedures.

(d) **Tax-Exempt Status**

If you intend to apply for federal tax-exempt status, you must elaborate on the purposes set forth in this section under a separate section for Other Provisions.

(e) **Powers**

All Not-for-Profit Corporations are granted many powers by statute. Because these powers are statutory, they do not need to be listed and should not be listed in the purpose clause either as purposes or as powers. Among the granted, statutory powers are the powers to sue and be sued, complain and defend, in the corporate name; to have and affix a corporate seal; to purchase, lease, acquire, hold, use, own, or otherwise deal in and with any real and personal property; to make contracts and incur liabilities; to elect or appoint officers; to make and alter by-laws; to loan money for its corporate purposes; to have and exercise all powers necessary or convenient to effect any or all of the purposes for which the corporation is organized.

## **Directors**

There must be at least three (3) directors. They do not have to be Illinois residents or corporation members, but you may require these restrictions or impose any other qualifications you choose. Restrictions and qualifications may be set forth on the Articles of Incorporation under the Other Provisions section, or you may leave restrictions and qualifications to be set forth in the corporate by-laws.

## **Incorporators**

One or more incorporators may organize a corporation under this Act. An incorporator may be either a natural person age 18 or older or a corporation, domestic or foreign, whether not-for-profit or otherwise.

## Other Provisions

Below or following the purpose clause, you may list any other provisions regarding the internal affairs of the corporation you wish to have included as part of the Articles of Incorporation. These may include:

(a) **Tax-Exempt Status**

If you intend to apply to the IRS for tax-exempt status and the section of the Internal Revenue Code under which your corporation will fall requires an elaboration of purposes, the means for achieving them, procedures for dissolution, etc., this is the place to make those statements. This section must be written in language and format that conforms to the specifications of the IRS Code. These statements will play a large part in the determination of your tax status by the IRS. *(Note — In certain cases, this information may be included in your by-laws instead of placed in the Articles of Incorporation. Check Publication 557, ask the IRS, or consult an attorney if you are uncertain about this.)*

(b) **Restrictions and Qualifications**

List who can be a member, an officer, or a director and what duties each must perform. This information need not be a part of the Articles of Incorporation, but if it is not, such information should be a part of the by-laws.

(c) **Other Regulations**

List any other regulation for the governing of the internal affairs of the corporation or leave these for the by-laws.

## COST AND EXPEDITED SERVICE

To become a Not-for-Profit Corporation, submit two (2) identical copies of the Articles of Incorporation, with at least one copy being the original, and the \$50 filing fee in the form of a certified check, cashiers check or money order payable to Secretary of State. All Articles of Incorporation, including the filing fee, must be mailed to the Department of Business Services office in Springfield for review.

The department offers the review and, if approved, the filing of Articles of Incorporation on an expedited basis within 24 hours of receipt in either the Springfield or Chicago office. Pursuant to the provisions of the Illinois General Not For Profit Corporation Act, all such requests for expedited service must be made **in person** either in the Springfield or Chicago office and accompanied by a separate expedited service fee of \$25, payable to Secretary of State, in addition to the \$50 filing fee. Any Articles of Incorporation hand-delivered to either the Springfield or Chicago office not requesting expedited service will be reviewed on a routine (non-expedited) basis in the Springfield office.

When approved, the Secretary of State will stamp the date of filing on both copies and return one copy to the incorporators or their representative.

# **FILINGS AFTER INCORPORATING**

## **Federal Income Tax**

Should you decide to apply for federal income tax exemption, you must do so after you have been incorporated and have received the filed Articles of Incorporation from the Secretary of State. Obtain the proper application form from the IRS, and complete and submit the application, along with photocopies of your Articles of Incorporation and your by-laws, to the IRS. The IRS will notify you of their determination, and the annual reports that will be required in the future, after receiving your documents.

If you do not apply for or do not receive a federal tax exemption, you must file federal income tax returns and pay the appropriate tax. Consult the IRS for the time to file and the forms to use.

## **Illinois Income Tax**

If your corporation receives a federal tax exemption, it is exempt from Illinois income tax. No reports need to be filed and no tax is due.

If you do not apply for or do not receive a federal tax exemption, you must file Illinois income tax returns and pay the appropriate tax. Consult the Illinois Department of Revenue, Income Tax Division, for the time to file and forms to use.

## **Illinois Sales Tax**

Some not-for-profit corporations may qualify for an exemption from paying sales tax on goods purchased for the use of the organization if they are formed for exclusively charitable, religious or educational purposes or for senior citizens. To find out if you qualify, write a letter of request to the Illinois Department of Revenue, Sales Tax Division, and enclose photocopies of your Articles of Incorporation, by-laws, constitution, IRS exemption letter, or any other document that may help in determining your status. The Department of Business Services will notify you of your status.

If you qualify for sales tax exemption, you will be issued a letter ruling to that effect. You may not use your not-for-profit registration number or IRS number to claim exemption from Illinois sales tax.

## **Illinois Attorney General Registration**

Certain charitable organizations must register with the Attorney General, Division of Charitable Trust and Solicitations, under either or both the Illinois Charitable Trust Act or the Illinois Solicitation Act. Information and forms may be obtained from the Office of the Illinois Attorney General.



## REPORTING REQUIREMENTS

### **Annual Reports to the Secretary of State**

ALL Not-for-Profit Corporations must file an annual report of officers and directors with the Secretary of State. The due date depends upon when the corporation was formed. The annual report is due before the first day of the corporation's anniversary month each year. The anniversary month is the month in which the corporation was formed. For example, if the date of incorporation was Sept. 15, the anniversary month is September and each annual report is due before the first day of September each year. Forms will be sent to the registered agent approximately 60 days before the due date. **Failure to file an annual report may result in involuntary dissolution of the corporation.**

### **Annual Reports to Other Government Agencies**

The Internal Revenue Service, the Illinois Department of Revenue and the Illinois Attorney General may require other annual returns. Whether you must file a return and which return you will use depends in part on your status as a tax-exempt or non-tax-exempt corporation. To be sure of your obligations, please consult the proper agency.

### **Other Reports to the Secretary of State**

Any change in the corporate name, duration or purpose will require that the Articles of Incorporation be amended, using the proper form. Also, should the corporation need to report a merger, dissolution or reinstatement, it should use the proper form. All forms for these reports are available from the Secretary of State and should be filed upon the occurrence of the particular event.

The government agencies listed in this guide are not intended to be a complete list, but merely those agencies most frequently required to be consulted. Some local governments also may require filings or reports.

## **CONTACT INFORMATION**

### **SECRETARY OF STATE**

[www.cyberdriveillinois.com](http://www.cyberdriveillinois.com)

Secretary of State  
Department of Business Services  
Corporation Division  
501 S. Second St., Rm. 350  
Springfield, IL 62756  
217-782-6961

Secretary of State  
Department of Business Services  
Corporation Division  
69 W. Washington St., Ste. 1240  
Chicago, IL 60602  
312-793-3380

### **DEPARTMENT OF REVENUE**

[www.revenue.state.il.us/](http://www.revenue.state.il.us/)

Department of Revenue  
Income Tax Division  
101 W. Jefferson St.  
Springfield, IL 62708  
217-782-9488  
800-732-8866

Department of Revenue  
Income Tax Division  
100 W. Randolph St.  
Chicago, IL 60601  
800-732-8866

Department of Revenue  
Sales Tax Division  
101 W. Jefferson St.  
Springfield, IL 62708  
217-782-9488  
800-732-8866

Department of Revenue  
Sales Tax Division  
100 W. Randolph St.  
Chicago, IL 60601  
800-732-8866

### **ATTORNEY GENERAL**

Illinois Attorney General  
Division of Charitable Trust and Solicitations  
100 W. Randolph St., 11th Fl.  
Chicago, IL 60601  
312-814-2595

### **INTERNAL REVENUE SERVICE**

(form pick-up only)

[www.irs.ustreas.gov](http://www.irs.ustreas.gov)

Internal Revenue Service  
320 W. Washington St., Rm. 611  
Springfield, IL 62708  
800-829-1040

Internal Revenue Service  
Attn: Forms Services  
230 S. Dearborn St.  
Chicago, IL 60609  
800-829-1040

All IRS forms and publications may be requested from:  
Internal Revenue Service  
Forms  
P.O. Box 24672  
Kansas City, MO 64131



## Illinois Secretary of State - Incorporation Guideline

District 6450 - New Club Initiative

**Step 1: Visit the Illinois Secretary of State website.**

**Step 2: Navigate to the Articles of Incorporation portal - Not for Profit.**

[http://www.cyberdriveillinois.com/publications/business\\_services/nfp.html](http://www.cyberdriveillinois.com/publications/business_services/nfp.html)

**Screen 1**

The proposed name must be entered in the following way: "Rotary International '\_RI approved club name' Rotary Club."

For Example: "Rotary International Chicago Near South Rotary Club"



**Screen 2**

Decide amongst your executive members who to list. The Secretary or President is a good option.

The registered agent address should be the address that you would like associated with your club. Initially, it can be the home or business address of the individual used for the registered agent.



District 6450 - New Club Initiative


Screen 3

Include the name, and address of your executive board members. This usually consists of the President, Treasurer, and Secretary.

OFFICE OF THE ILLINOIS SECRETARY OF STATE

JESSE WHITE

SECRETARY OF STATE



Articles of Incorporation - Not For Profit

Board of Directors

Enter the Name and Address of Every Member of the Corporation's Initial Board of Directors (Minimum of 3). Enter up to 60 characters. Please abbreviate if necessary.

	Name	Street	City	State	Zip
1.	President	1000 President Way	Your Town	IL	00000
2.	Treasurer	1000 Treasurer Way	Your Town	IL	00000
3.	Secretary	1000 Secretary Way	Your Town	IL	00000
4.					
5.					
6.					
7.					

Continue

Illinois Secretary of State - Incorporation Guideline

BACK TO CYBERDRIVE ILLINOIS GOV HOME PAGE

## District 6450 - New Club Initiative

## Screen 4


This screen requires that you choose a purpose for your club. You can be more specific, but you may also choose the general option shown below.

This selection allows maximum flexibility.

OFFICE OF THE ILLINOIS SECRETARY OF STATE

JESSE WHITE

SECRETARY OF STATE



Articles of Incorporation - Not For Profit

Purpose (Click all applicable items.)

☐ Charitable.

☐ Benevolent.

☐ Eleemosynary.

☐ Educational.

☐ Civic.

☐ Patriotic.

☐ Political.

☐ Religious.

☐ Social.

☐ Literary.

☐ Athletic.

☐ Scientific.

☐ Research.

☐ Agricultural.

☐ Horticultural.

☐ Soil Improvement.

☐ Crop Improvement.

☐ Livestock or poultry Improvement.

☐ Professional, commercial, industrial, or trade association.

☐ Promoting the development, establishment, or expansion of industries.

☐ Electrification on a cooperative basis.

☐ Telephone service on a mutual cooperative basis.

☐ Ownership and operation of water supply facilities for drinking and general domestic use on a mutual or cooperative basis.

☐ Ownership or administration of residential property on a cooperative basis.

☐ Administration and operation of property owned on a condominium basis or by a homeowner association.

☐ Administration and operation of an organization on a cooperative basis producing or furnishing goods, services, or facilities primarily for the benefit of its members who are consumers of those goods, services, or facilities.

☐ Operation of a community mental health board or center organized pursuant to the Community Mental Health Act for the purpose of providing direct patient services.

☐ Provision of debt management services as authorized by the Debt Management Service Act.

☐ Promotion, operation, and administration of a ridesharing arrangement as defined in Section 1-176.1 of the Illinois Vehicle Code.

☐ The administration and operation of an organization for the purpose of assisting low-income consumers in the acquisition of utility and telephone services.

☒ Any purpose permitted to be exempt from taxation under Section 501(c) or 501(d) of the United States Internal Revenue Code, as now in or hereafter amended.

☐ Any purpose that would qualify for tax-deductible gifts under the Section 170(c) of the United States Internal Revenue Code, as now or hereafter amended.

☐ Furnishing of Natural Gas on a cooperative basis.

Continue

BACK TO CYBERDRIVEILLINOIS.COM HOME PAGE

District 6450 - New Club Initiative

Screen 5

This section is not applicable for the incorporation of the Rotary Club.

OFFICE OF THE ILLINOIS SECRETARY OF STATE

JESSE WHITE

SECRETARY OF STATE



Articles of Incorporation - Not For Profit

Interrogatories

Is this corporation a Condominium Association as established under the Condominium Property Act?

☐ Yes
 ☒ No

Is this corporation a Cooperative Housing Corporation as defined in Section 216 of the Internal Revenue Code of 1954?

☐ Yes
 ☒ No

Is this corporation a Homeowner's Association which administers a common-interest community as defined in subsection (c) of Section 9-102 of the Code of Civil Procedure?

☐ Yes
 ☒ No

Continue

BACK TO CYBERDRIVEILLINOIS.COM HOME PAGE


Screen 6

This should be attested by an executive board member such as the President or Treasurer.

OFFICE OF THE ILLINOIS SECRETARY OF STATE

JESSE WHITE

SECRETARY OF STATE



Articles of Incorporation - Not For Profit

Note: The incorporator must be a natural person of the age of 18 years or more.

Attestation

The undersigned incorporator hereby declares, under penalties or perjury, that the statements made in the foregoing Article of Incorporation are true.

Name:

Presidents Name

Address:

1000 Presidents Way

City:

Your Town

State:

Illinois

Zip:

00000

Submit

BACK TO CYBERDRIVEILLINOIS.COM HOME PAGE



## District 6450 - New Club Initiative

## Screen 7



**Articles of Incorporation - Not For Profit**

**Select Processing**

Please review the two options below to determine which type of service you require. Once we receive your request we cannot make any changes. However, the application can be cancelled prior to processing and the charge will be credited. You may call us at 217-782-6961 during normal business hours.

**Expedited service** means that your request will be reviewed within 24 business hours of the submission. A breakdown of the fees will be displayed for review at the end of the process before you submit payment.

**Non-expedited service** means that your submission will be reviewed within 10 business days.

Please choose one:

☒ **No Expedited** service is required. I understand that my application will be reviewed within ten business days.

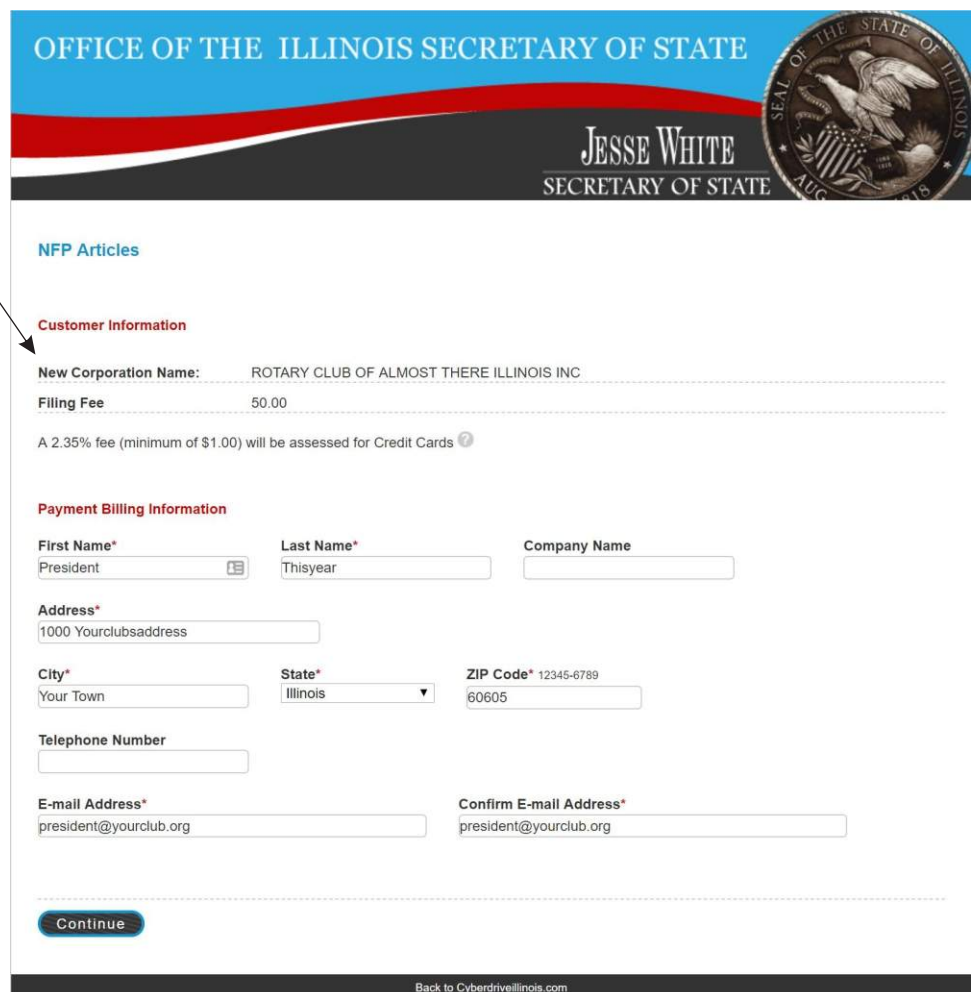
☐ I request **Expedited** service. I understand and agree to pay the additional expedited fee.

[Continue](#)

[Back to Cyberdriveillinois.com](#)

Typically, a non expedited selection is appropriate and is more cost efficient. If your incorporation is time sensitive, an expedited service is available.

## Screen 8



**NFP Articles**

**Customer Information**

**New Corporation Name:** ROTARY CLUB OF ALMOST THERE ILLINOIS INC

**Filing Fee** 50.00

A 2.35% fee (minimum of \$1.00) will be assessed for Credit Cards ?

**Payment Billing Information**

**First Name\*** President **Last Name\*** Thisyear **Company Name**

**Address\*** 1000 Yourclubaddress

**City\*** Your Town **State\*** Illinois **ZIP Code\*** 12345-6789 60605

**Telephone Number**

**E-mail Address\*** president@yourclub.org **Confirm E-mail Address\*** president@yourclub.org

[Continue](#)

[Back to Cyberdriveillinois.com](#)

Filing fee may change. Review current applicable fees as your prepare your application.



District 6450 - New Club Initiative


Screen 9

Confirm payment information. If you haven't discussed reimbursement processes for the club, a brief conversation is helpful at moments like this.

OFFICE OF THE ILLINOIS SECRETARY OF STATE

JESSE WHITE

SECRETARY OF STATE



NFP Articles

Please review

Customer Information

New Corporation Name

ROTARY CLUB OF ALMOST THERE ILLINOIS INC

Filing Fee

50.00

A 2.35% fee (minimum of \$1.00) will be assessed for Credit Cards ?

Payment Billing Information

Edit

First Name

President

Last Name

Thisyear

Company Name

Address

1000 Yourclubaddress

City

Your Town

State

IL

ZIP Code

60605

Telephone Number

E-mail Address

president@yourclub.org

Pay Now

Back to Cyberdriveillinois.com

## District 6450 - New Club Initiative

## Screen 10

10/21/2018

Articles of Incorporation - Not For Profit



Final data review to confirm information prior to processing. Carefully review provided information as making changes after this point requires additional paperwork and fees.

## Articles of Incorporation - Not For Profit

Please review the data you entered.

Corporation Name

[Edit](#)

Corporation Name: ROTARY CLUB OF ALMOST THERE ILLINOIS INC

Agent Details

[Edit](#)

Name: ROTARIAN FOREVER  
Address: 1234 YOUR CLUB RD  
County : COOK  
City: YOUR TOWN  
State: ILLINOIS  
Zip: 60605-0000

Board of Directors

[Edit](#)

PRESIDENT 1000 PRESIDENT WAY YOUR TOWN IL 00000  
TREASURER 1000 TREASURER WAY YOUR TOWN IL 00000  
SECRETARY 1000 SECRETARY WAY YOUR TOWN IL 00000

Purpose

[Edit](#)

Any purpose permitted to be exempt from taxation under Section 501(c) or 501(d) of the United States Internal Revenue Code, as now in or hereafter amended.

Interrogatories

[Edit](#)

1. This corporation is a Condominium Association as established under the Condominium Property Act. **No**
2. This corporation is a Cooperative Housing Corporation as defined in Section 216 of the Internal

<https://www.ilsos.gov/nfparticles/attestation.do>

1/2

After reviewing information, provide payment criteria. (This process is not shown here). Upon payment retain receipt of transaction. It is suggested to maintain a digital and printed copy.



## IRS FAQ for US Rotary Clubs

# Frequently Asked Questions

## US Rotary Clubs and the IRS



*This information is not intended to give legal or tax advice. Please consult your professional advisors to determine the specific rules applicable to you or contact the IRS directly. ([www.irs.gov](http://www.irs.gov) or 1-877-829-5500)*

### **What is an Employer Identification Number (EIN) and does my club need to apply for one?**

An Employer Identification Number (EIN) is a nine-digit number used by the IRS to identify an entity. All Rotary clubs in the US and US territories (American Samoa, Guam, Northern Marianas, Puerto Rico, US Virgin Islands) need to apply for an EIN when they charter. To find out more, visit [How to Apply for an EIN](#) and [Instructions for Form SS-4](#) at [www.irs.gov](http://www.irs.gov). Please note that RI's Group Exemption Number (GEN) 0573 must be included on the form in order for your club to be tax-exempt under RI's 501(c)(4) group exemption ruling.

### **My club has a satellite club. Do they need their own EIN?**

Since satellite club members are members of their sponsor club, it is recommended that the satellite club operate under the tax-exempt status of the sponsor club. A club can only be included under RI's group exemption ruling once chartered as an independent Rotary club.

### **My club intends to operate as a 501(c)(4) organization. Do we need to notify the IRS?**

Legislation enacted at the end of 2015 requires you to notify the IRS by submitting [Form 8976](#) within 60 days of the date your club becomes a legal entity (i.e. date your articles of incorporation were approved or date your constitution or bylaws were adopted). Clubs that have filed a Form 990 or Form 1024 on or before 8 July 2016 are not required to file the notification. Visit [Electronically Submit Your Form 8976](#) at [www.irs.gov](http://www.irs.gov) for more details. *Note: Submitting this form is not a determination of tax-exempt status. See the next question for more information on becoming tax-exempt under RI's group exemption ruling.*

### **What must my club do to be included under RI's 501(c)(4) group exemption ruling?**

Send a copy of the notice from the IRS confirming your EIN to your [Club and District Support Representative](#) (CDS). It is also necessary to include a positive confirmation that your club wishes to be included in RI's 501(c)(4) group exemption ruling. RI will enter your club's EIN into its database and annually confirms with the IRS all clubs included under RI's 501(c)(4) group exemption ruling.

### **What is the official naming convention for Rotary clubs according to the IRS?**

RI will report your club's name as the Rotary Club of Community, State. To confirm the club name registered with the IRS, please contact them directly at 877-829-5500.

### **Can my club use RI's EIN when applying for a bank account or filing?**

No. Each EIN is specifically assigned to a single entity or club. Your club must use its own EIN when applying for a bank account or filing its annual information form.

### **What do the terms 501(c)(3) and 501(c)(4) mean?**

These are federal tax classifications for organizations that meet the requirements of Internal Revenue Code section 501(a). Charitable organizations are exempt under section 501(c)(3) and social welfare organizations under 501(c)(4) of the Internal Revenue Code. Under RI's group exemption ruling, Rotary, Rotaract and Interact clubs are entitled to 501(c)(4) tax-exempt status. For more information about these tax classifications, please visit [Life Cycle of an Exempt Organization](#) at [www.irs.gov](http://www.irs.gov).



Rotary

**Are contributions to my club considered charitable contributions for individuals?**

Contributions to clubs are generally not tax deductible as charitable contributions. Contributions to any club charitable fund that is tax-exempt under [Section 501\(c\)\(3\)](#) of the Internal Revenue Code may be tax-deductible as charitable contributions. Membership dues may be deductible for some Rotarians as business expenses.

**Can my club or club foundation use The Rotary Foundation's EIN to receive charitable contributions?**

No. Each EIN is assigned to a specific entity. The club or club foundation itself must meet the requirements of the Internal Revenue Code in order to receive charitable contributions.

**Can my club or club foundation obtain 501(c)(3) tax-exempt status under The Rotary Foundation?**

No. The Rotary Foundation (TRF) does not currently have a group exemption under which clubs or club foundations can obtain 501(c)(3) tax-exempt status. Clubs must work directly with the IRS to apply for this exemption on their own.

TRF operates a Donor Advised Fund (DAF) that provides similar benefits to a club foundation. Any club interested in forming a foundation or having trouble managing an existing foundation should review the opportunities available through TRF DAF at [www.rotary.org/plannedgiving](http://www.rotary.org/plannedgiving).

**My club obtained 501(c)(3) tax-exempt status. Do we need to report this to RI?**

Yes. Your club should submit to your [CDS representative](#) a copy of the IRS notice confirming its tax-exempt status. RI will then remove your club and EIN from our 501(c)(4) group exemption ruling.

**Does my club need to file an annual information form with the IRS?**

Yes. While Rotary clubs and districts are exempt from paying federal income tax, the law requires all Rotary clubs and districts to file an annual information return (Form 990, 990-EZ) or submit an annual electronic notice (990-N). The version a club files is dependent upon its gross receipts for the year. For more information about this requirement and to find out which form to file, please see [Which forms do exempt organizations file?](#) at [www.irs.gov](http://www.irs.gov).

**What is the deadline to file an annual information form to the IRS?**

These forms are due every year by the 15<sup>th</sup> day of the 5<sup>th</sup> month after the close of your tax year. For clubs following RI's tax year ending on 30 June, the deadline to file is 15 November.

**Where can my club find more information about Form 990-N (e-Postcard)?**

Please refer to [Annual Electronic Notice \(Form 990-N\): Frequently Asked Questions and Answers](#) at [www.irs.gov](http://www.irs.gov).

**Should my club include the receipt of Global or District Grants on our Form with the IRS?**

If you are required to file an annual information return (Form 990, 990-EZ), generally you should report all receipts and disbursements on the form regardless of where those receipts originated.

**My club received notice from the IRS that our tax-exempt status was automatically revoked for failure to file for three consecutive years. What does this mean and what do we do?**

According to IRS regulations, an organization whose tax-exempt status has been automatically revoked must apply to have its tax-exempt status reinstated, even if it was not originally required to file an application for exemption. To check your club's tax-exempt status, visit [Exempt Organizations Select Check](#) at [www.irs.gov](http://www.irs.gov). For more information about the consequences of revocation and how to apply for reinstatement, please see [Automatic Exemption Revocation for Non-Filing: Frequently Asked Questions](#) at [www.irs.gov](http://www.irs.gov). For any further questions, please contact the IRS directly at 877-829-5500.

**IRS - Applying for an EIN**

## District 6450 - New Club Initiative

**Step 1: Visit the IRS website.****Step 2: Navigate to the Apply for an Employer Identification Number (EIN) Online portal. Select Apply Now.**<https://www.irs.gov/businesses/small-businesses-self-employed/apply-for-an-employer-identification-number-ein-online>

## Screen 1



The screenshot shows the IRS.gov EIN Assistant interface. At the top, there's a navigation bar with 'Help | Apply for New EIN | Exit'. Below it, the 'EIN Assistant' title is followed by a progress bar with five steps: 1. Identify, 2. Authenticate, 3. Addresses, 4. Details, and 5. EIN Confirmation. The '1. Identify' step is active. The main heading is 'What type of legal structure is applying for an EIN?'. Below this, a paragraph explains that before applying, the user should determine the legal structure. A note says 'Choose the type you are applying for. If you don't see your type, select "View Additional Types."'. There are several radio button options: Sole Proprietor, Partnerships, Corporations, Limited Liability Company (LLC), Estate, Trusts, and View Additional Types, Including Tax-Exempt and Governmental Organizations. A help topic on the right asks 'What if I do not know what type of legal structure or organization to choose?'. At the bottom, there are '<< Back' and 'Continue >>' buttons, and links for 'IRS Privacy Policy' and 'Accessibility'.

As Rotary is a social club,  
continue to the next screen  
by selecting "View  
Additional Types"

## Screen 2



The screenshot shows the IRS.gov EIN Assistant interface for 'Additional Types'. The progress bar is the same as in Screen 1. The main heading is 'Additional Types'. Below this, a paragraph says 'Choose the type you are applying for. You can click the underlined terms for a description.' There are two columns of radio button options, each with a link to a description: Bankruptcy Estate (Individual), Block/Tenant Association, Church, Church-Controlled Organization, Community or Volunteer Group, Employer/Fiscal Agent (under IRC Sec 3504), Employer Plan (401K, Money Purchase Plan, etc.), Farmers' Cooperative, Government Federal/Military, Government Indian Tribal Governments, Government State/Local, Homeowners/Condo Association, Household Employer, IRA, Memorial or Scholarship Fund, National Guard, Plan Administrator, Political Organization, PT/PTO or School Organization, REMIC, Social or Savings Club, Sports Teams (community), Withholding Agent, and Other Non-Profit/Tax-Exempt Organizations. A help topic on the right asks 'What if I still do not know what type of structure or organization to choose?'. At the bottom, there are '<< Back' and 'Continue >>' buttons, and links for 'IRS Privacy Policy' and 'Accessibility'.

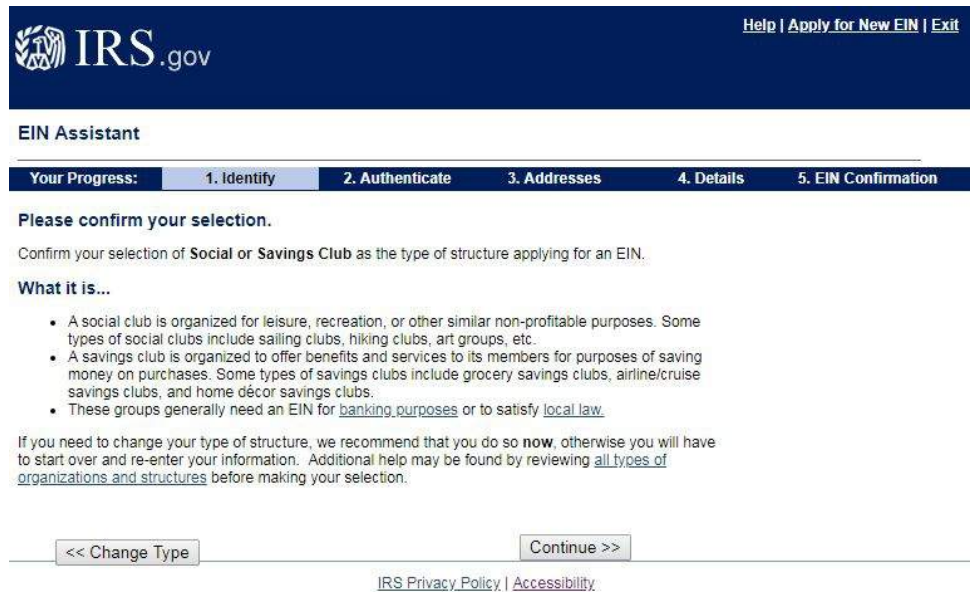
Select Social or Savings  
Club



## District 6450 - New Club Initiative

## Screen 3

This screen is for reference only. Continue to the next screen.



IRS.gov [Help](#) | [Apply for New EIN](#) | [Exit](#)

EIN Assistant

Your Progress: 1. Identify 2. Authenticate 3. Addresses 4. Details 5. EIN Confirmation

Please confirm your selection.

Confirm your selection of **Social or Savings Club** as the type of structure applying for an EIN.

What it is...

- A social club is organized for leisure, recreation, or other similar non-profitable purposes. Some types of social clubs include sailing clubs, hiking clubs, art groups, etc.
- A savings club is organized to offer benefits and services to its members for purposes of saving money on purchases. Some types of savings clubs include grocery savings clubs, airline/cruise savings clubs, and home décor savings clubs.
- These groups generally need an EIN for [banking purposes](#) or to satisfy [local law](#).

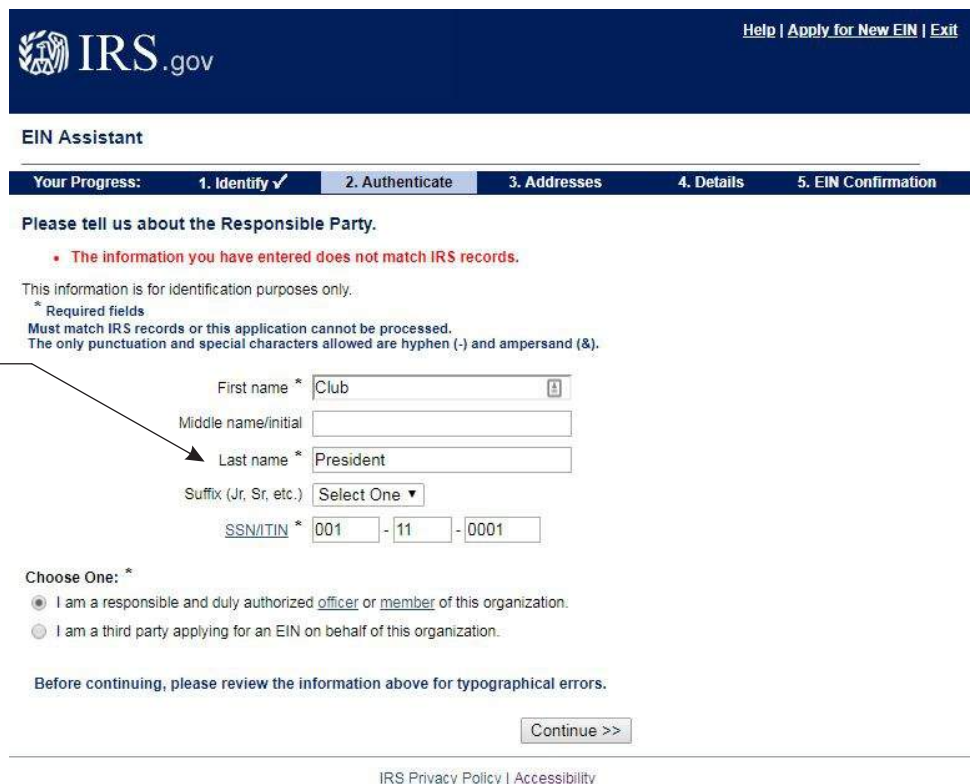
If you need to change your type of structure, we recommend that you do so **now**, otherwise you will have to start over and re-enter your information. Additional help may be found by reviewing [all types of organizations and structures](#) before making your selection.

<< Change Type Continue >>

[IRS Privacy Policy](#) | [Accessibility](#)

## Screen 4

Enter Club President's information or Treasurer's information here.



IRS.gov [Help](#) | [Apply for New EIN](#) | [Exit](#)

EIN Assistant

Your Progress: 1. Identify ✓ 2. Authenticate 3. Addresses 4. Details 5. EIN Confirmation

Please tell us about the Responsible Party.

- The information you have entered does not match IRS records.

This information is for identification purposes only.

\* Required fields

Must match IRS records or this application cannot be processed.  
The only punctuation and special characters allowed are hyphen (-) and ampersand (&).

First name \* Club

Middle name/initial

Last name \* President

Suffix (Jr, Sr, etc.) Select One ▼

SSN/ITIN \* 001 - 11 - 0001

Choose One: \*

- ☒ I am a responsible and duly authorized [officer](#) or [member](#) of this organization.
- ☐ I am a third party applying for an EIN on behalf of this organization.

Before continuing, please review the information above for typographical errors.

Continue >>

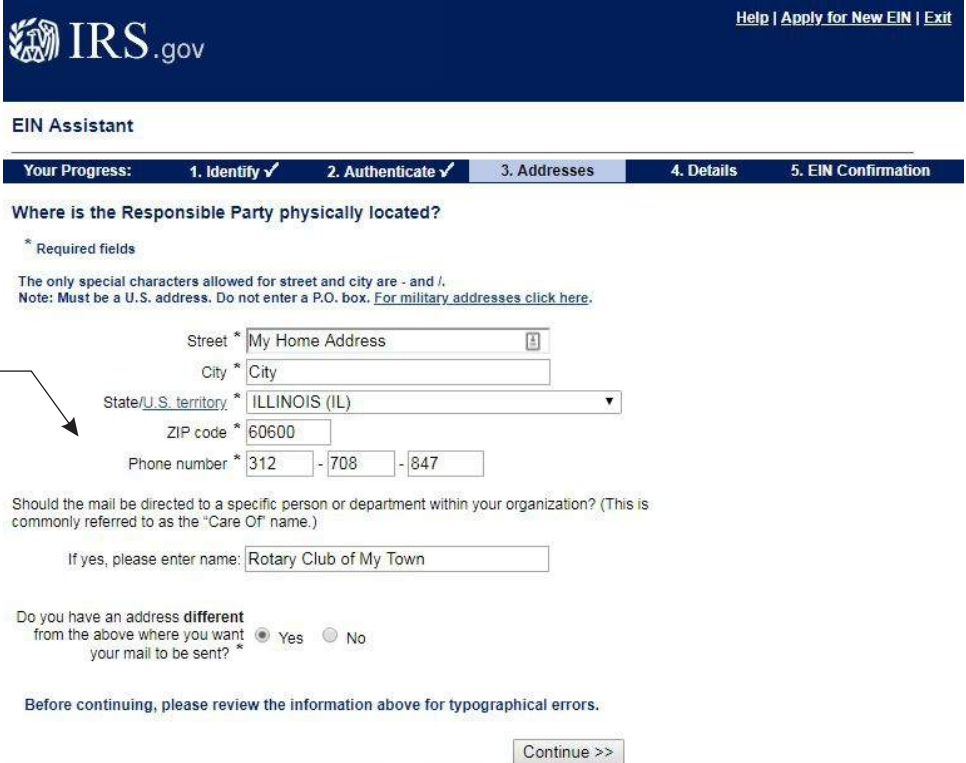
[IRS Privacy Policy](#) | [Accessibility](#)



## District 6450 - New Club Initiative

## Screen 5

Provide the home or business address of the individual you entered in screen 4.



IRS.gov [Help](#) | [Apply for New EIN](#) | [Exit](#)

**EIN Assistant**

**Your Progress:** 1. Identify ✓ 2. Authenticate ✓ 3. Addresses 4. Details 5. EIN Confirmation

Where is the Responsible Party physically located?

\* Required fields

The only special characters allowed for street and city are - and /.  
Note: Must be a U.S. address. Do not enter a P.O. box. [For military addresses click here.](#)

Street \* My Home Address

City \* City

State/U.S. territory \* ILLINOIS (IL)

ZIP code \* 60600

Phone number \* 312 - 708 - 847

Should the mail be directed to a specific person or department within your organization? (This is commonly referred to as the "Care Of" name.)

If yes, please enter name: Rotary Club of My Town

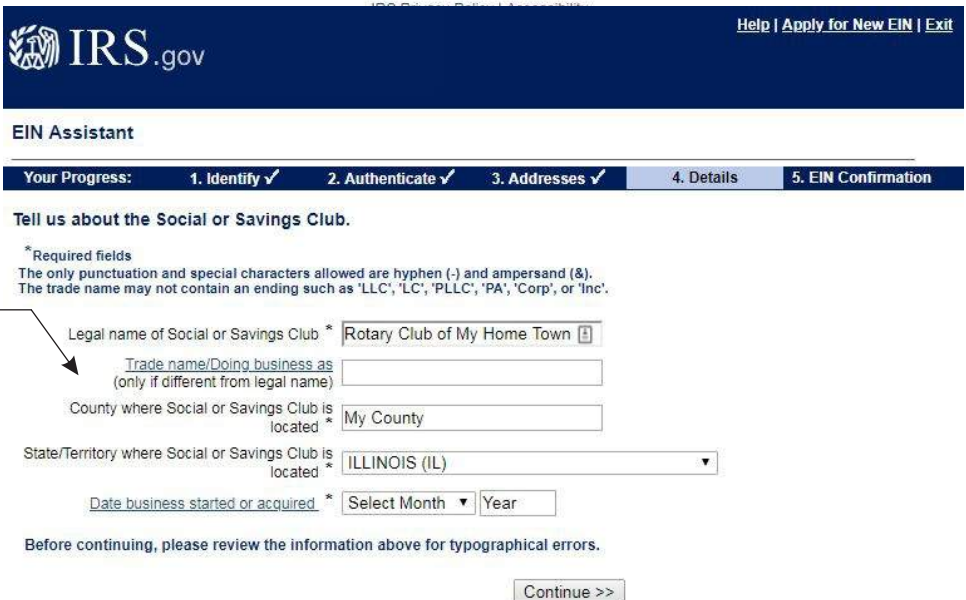
Do you have an address **different** from the above where you want your mail to be sent? \* ☒ Yes ☐ No

Before continuing, please review the information above for typographical errors.

[Continue >>](#)

## Screen 6

Refer to your Illinois Incorporation Document. Provide incorporated name here.



IRS.gov [Help](#) | [Apply for New EIN](#) | [Exit](#)

**EIN Assistant**

**Your Progress:** 1. Identify ✓ 2. Authenticate ✓ 3. Addresses ✓ 4. Details 5. EIN Confirmation

Tell us about the Social or Savings Club.

\* Required fields

The only punctuation and special characters allowed are hyphen (-) and ampersand (&).  
The trade name may not contain an ending such as "LLC", "LC", "PLLC", "PA", "Corp", or "Inc".

Legal name of Social or Savings Club \* Rotary Club of My Home Town

[Trade name/Doing business as](#) (only if different from legal name)

County where Social or Savings Club is located \* My County

State/Territory where Social or Savings Club is located \* ILLINOIS (IL)

[Date business started or acquired](#) \*  Select Month  Year

Before continuing, please review the information above for typographical errors.

[Continue >>](#)

## District 6450 - New Club Initiative

## Screen 7



IRS.gov [Help](#) | [Apply for New EIN](#) | [Exit](#)

EIN Assistant

Your Progress: 1. Identify ✓ 2. Authenticate ✓ 3. Addresses ✓ 4. Details 5. EIN Confirmation

Tell us more about the Social or Savings Club.

\* Required fields

Does your business own a highway motor vehicle with a taxable gross weight of 55,000 pounds or more? \* ☐ Yes ☒ No

Does your business involve gambling/wagering? \* ☐ Yes ☒ No

Does your business need to file Form 720 (Quarterly Federal Excise Tax Return)? \* ☐ Yes ☒ No

Does your business sell or manufacture alcohol, tobacco, or firearms? \* ☐ Yes ☒ No

Do you have, or do you expect to have, any employees who will receive Forms W-2 in the next 12 months? \* (Forms W-2 require additional filings with the IRS.) ☐ Yes ☒ No

Before continuing, please review the information above.

[Continue >>](#)

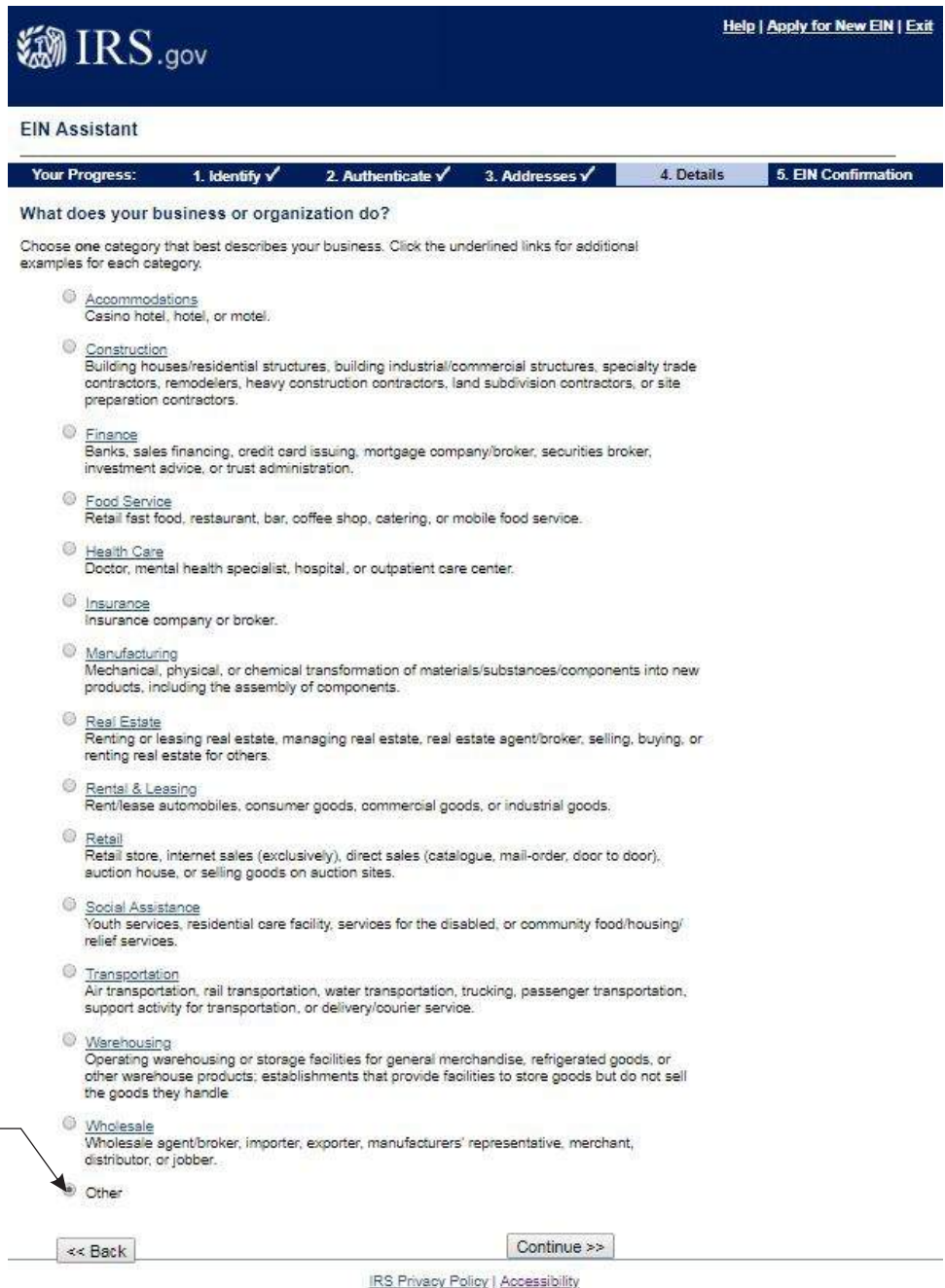
Help Topics  
[? What is Form 720?](#)

[IRS Privacy Policy](#) | [Accessibility](#)

All items can be identified as "no" as this is a non-profit organization.

## District 6450 - New Club Initiative

## Screen 8



IRS.gov [Help](#) | [Apply for New EIN](#) | [Exit](#)

EIN Assistant

Your Progress: 1. Identify ✓ 2. Authenticate ✓ 3. Addresses ✓ 4. Details 5. EIN Confirmation

What does your business or organization do?

Choose one category that best describes your business. Click the underlined links for additional examples for each category.

- ☐ [Accommodations](#)  
Casino hotel, hotel, or motel.
- ☐ [Construction](#)  
Building houses/residential structures, building industrial/commercial structures, specialty trade contractors, remodelers, heavy construction contractors, land subdivision contractors, or site preparation contractors.
- ☐ [Finance](#)  
Banks, sales financing, credit card issuing, mortgage company/broker, securities broker, investment advice, or trust administration.
- ☐ [Food Service](#)  
Retail fast food, restaurant, bar, coffee shop, catering, or mobile food service.
- ☐ [Health Care](#)  
Doctor, mental health specialist, hospital, or outpatient care center.
- ☐ [Insurance](#)  
Insurance company or broker.
- ☐ [Manufacturing](#)  
Mechanical, physical, or chemical transformation of materials/substances/components into new products, including the assembly of components.
- ☐ [Real Estate](#)  
Renting or leasing real estate, managing real estate, real estate agent/broker, selling, buying, or renting real estate for others.
- ☐ [Rental & Leasing](#)  
Rent/lease automobiles, consumer goods, commercial goods, or industrial goods.
- ☐ [Retail](#)  
Retail store, internet sales (exclusively), direct sales (catalogue, mail-order, door to door), auction house, or selling goods on auction sites.
- ☐ [Social Assistance](#)  
Youth services, residential care facility, services for the disabled, or community food/housing/relief services.
- ☐ [Transportation](#)  
Air transportation, rail transportation, water transportation, trucking, passenger transportation, support activity for transportation, or delivery/courier service.
- ☐ [Warehousing](#)  
Operating warehousing or storage facilities for general merchandise, refrigerated goods, or other warehouse products; establishments that provide facilities to store goods but do not sell the goods they handle.
- ☐ [Wholesale](#)  
Wholesale agent/broker, importer, exporter, manufacturers' representative, merchant, distributor, or jobber.
- ☐ Other

<< Back Continue >>

[IRS Privacy Policy](#) | [Accessibility](#)

Select "Other" and  
continue to the next screen.

## District 6450 - New Club Initiative

## Screen 9

Select "Organization" as  
Rotary is considered a  
"social organization."



IRS.gov [Help](#) | [Apply for New EIN](#) | [Exit](#)

EIN Assistant

Your Progress: 1. Identify ✓ 2. Authenticate ✓ 3. Addresses ✓ 4. Details 5. EIN Confirmation

You have chosen Other.

Please choose one of the following that best describes your primary business activity:

- ☐ Consulting
- ☐ Manufacturing
- ☒ Organization (such as religious, environmental, social or civic, athletic, etc.)
- ☐ Rental
- ☐ Repair
- ☐ Sell goods
- ☐ Service
- ☐ Other – please specify your primary business activity:

<< Back Continue >>

## Screen 10

"Rotary International"  
should be added  
here.



IRS.gov [Help](#) | [Apply for New EIN](#) | [Exit](#)

EIN Assistant

Your Progress: 1. Identify ✓ 2. Authenticate ✓ 3. Addresses ✓ 4. Details 5. EIN Confirmation

You have chosen Other: Organization.

What is the primary activity of your organization?

- ☐ Athletic – please specify:
- ☐ Conservation – please specify:
- ☐ Environmental – please specify:
- ☐ Fundraising – please specify:
- ☐ Homeowners association
- ☐ Religious – please specify:
- ☒ Social or civic – please specify:
- ☐ Other – please specify:

Continue >>

## District 6450 - New Club Initiative

## Screen 11



IRS.gov [Help](#) | [Apply for New EIN](#) | [Exit](#)

EIN Assistant

Your Progress: 1. Identity ✓ 2. Authenticate ✓ 3. Addresses ✓ 4. Details ✓ 5. EIN Confirmation

How would you like to receive your EIN Confirmation Letter?

You have **two** options for receiving your confirmation letter. Please choose one below:

☒ **Receive letter online.** This option requires [Adobe Reader](#).  
You will be able to view, print, and save this letter immediately. It will not be mailed to you.

☐ **Receive letter by mail.** The IRS will send the letter to the mailing address you provided - allow up to 4 weeks for delivery.

[Continue >>](#)

[IRS Privacy Policy](#) | [Accessibility](#)

If you choose to receive the letter online, print a copy for the club's records, and also save a digital copy in a location accessible by all board members.

After this step, you will confirm all information, and then submit for consideration.



## New Rotary Club Application



# 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 

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 Middle name 

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 Family name 

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

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Member, Rotary Club of 

---

 List club's official name, including country

Email 

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 Phone 

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

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## 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

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## 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 \_\_\_\_\_

## Sample Rotary Club Constitution

# **\* Constitution of the Rotary Club of**

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## **Article 1 Definitions**

As used in this constitution, unless the context otherwise clearly requires, the words in this article shall have the following meanings:

1. Board: The Board of Directors of this club.
2. Bylaws: The bylaws of this club.
3. Director: A member of this club's Board of Directors.
4. Member: A member, other than an honorary member, of this club.
5. RI: Rotary International.
6. Satellite club (when applicable): A potential club whose members shall also be members of this club.
7. Year: The twelve-month period which begins on 1 July.

## **Article 2 Name**

The name of this organization shall be Rotary Club of \_\_\_\_\_

\_\_\_\_\_  
(Member of Rotary International)

- (a) The name of a satellite of this club (when applicable) shall be Rotary Satellite Club of \_\_\_\_\_  
(A satellite of Rotary Club of \_\_\_\_\_)

## **Article 3 Purposes**

The purposes of this club are to pursue the Object of Rotary, carry out successful service projects based on the Five Avenues of Service, contribute to the advancement of Rotary by strengthening membership, support The Rotary Foundation, and develop leaders beyond the club level.

## **Article 4 Locality of the Club**

The locality of this club is as follows: \_\_\_\_\_

## **Article 5 Object**

The Object of Rotary is to encourage and foster the ideal of service as a basis of worthy enterprise and, in particular, to encourage and foster:

- First.* The development of acquaintance as an opportunity for service;  
*Second.* High ethical standards in business and professions; the recognition of the worthiness of all useful occupations; and the dignifying of each Rotarian's occupation as an opportunity to serve society;

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\* The bylaws of Rotary International provide that each club admitted to membership in RI shall adopt this prescribed standard club constitution.

- Third.* The application of the ideal of service in each Rotarian's personal, business, and community life;
- Fourth.* The advancement of international understanding, goodwill, and peace through a world fellowship of business and professional persons united in the ideal of service.

### **Article 6 Five Avenues of Service**

Rotary's Five Avenues of Service are the philosophical and practical framework for the work of this Rotary club.

1. Club Service, the first Avenue of Service, involves action a member should take within this club to help it function successfully.
2. Vocational Service, the second Avenue of Service, has the purpose of promoting high ethical standards in businesses and professions, recognizing the worthiness of all dignified occupations, and fostering the ideal of service in the pursuit of all vocations. The role of members includes conducting themselves and their businesses in accordance with Rotary's principles and lending their vocational skills to club-developed projects in order to address the issues and needs of society.
3. Community Service, the third Avenue of Service, comprises varied efforts that members make, sometimes in conjunction with others, to improve the quality of life of those who live within this club's locality or municipality.
4. International Service, the fourth Avenue of Service, comprises those activities that members do to advance international understanding, goodwill, and peace by fostering acquaintance with people of other countries, their cultures, customs, accomplishments, aspirations, and problems, through reading and correspondence and through cooperation in all club activities and projects designed to help people in other lands.
5. Youth Service, the fifth Avenue of Service, recognizes the positive change implemented by youth and young adults through leadership development activities, involvement in community and international service projects, and exchange programs that enrich and foster world peace and cultural understanding.

### **Article 7 Exceptions to Provisions on Meetings and Attendance**

The bylaws may include rules or requirements not in accordance with article 8, section 1; article 12; and article 15, section 4, of this constitution. Such rules or requirements shall supersede the rules or requirements of these sections of this constitution; a club, however, must meet at least twice per month.

### **Article 8 Meetings**

**Section 1** — *Regular Meetings.* [See article 7 for exceptions to the provisions of this section.]

- (a) *Day and Time.* This club shall hold a regular meeting once each week on the day and at the time provided in the bylaws. Attendance may be in person, through an online meeting, or using an online connection for members whose attendance otherwise would be precluded. Alternatively, a club shall hold a meeting once each week or during the week(s) chosen in advance by posting an interactive activity on

the club's website. The latter type of meeting shall be considered as held on the day that the interactive activity is to be posted on the website.

- (b) *Change of Meeting.* For good cause, the board may change a regular meeting to any day during the period commencing with the day following the preceding regular meeting and ending with the day preceding the next regular meeting, or to a different hour of the regular day, or to a different place.
- (c) *Cancellation.* The board may cancel a regular meeting if it falls on a legal holiday, including a commonly recognized holiday, or during the week which includes a legal holiday, including a commonly recognized holiday, or in case of the death of a club member, or of an epidemic or of a disaster affecting the whole community, or of an armed conflict in the community which endangers the lives of the club members. The board may cancel not more than four regular meetings in a year for causes not otherwise specified herein provided that this club does not fail to meet for more than three consecutive meetings.
- (d) *Satellite Club Meeting (When Applicable).* If provided in the bylaws, a satellite club shall hold regular weekly meetings at a place and at a time and day decided by its members. The day, time and place of the meeting may be changed in a similar way to that provided for the club's regular meetings in section 1(b) of this article. A satellite club meeting may be cancelled for any of the reasons enumerated in section 1(c) of this article. Voting procedures shall be as provided in the bylaws.

**Section 2 — Annual Meeting.**

- (a) An annual meeting for the election of officers shall be held not later than 31 December as provided in the bylaws.
- (b) A satellite club (when applicable) shall hold an annual meeting of its members before 31 December to elect officers for the general governance of the satellite club.

**Section 3 — Board Meetings.** Written minutes should be provided for all board meetings. Such minutes should be available to all members within 60 days of said meeting.

**Article 9 Exceptions to Provisions on Membership**

The bylaws may include rules or requirements not in accordance with Article 10, sections 2 and 4 - 8 of this constitution. Such rules or requirements shall supersede the rules or requirements of these sections of this constitution.

**Article 10 Membership [See article 9 for exceptions to sections 2 and 4 - 8 of this article.]**

**Section 1 — General Qualifications.** This club shall be composed of adult persons who demonstrate good character, integrity, and leadership; possess good reputation within their business, profession, and/or community; and are willing to serve in their community and/or around the world.

**Section 2 — Kinds.** This club shall have two kinds of membership, namely: active and honorary.

**Section 3 — Active Membership.** A person possessing the qualifications set forth in article 5, section 2 of the RI constitution may be elected to active membership in this club.

**Section 4 — *Satellite Club Membership.*** Members of a satellite club shall also be members of the sponsor club until such time as the satellite club shall be admitted into membership of RI as a Rotary club.

**Section 5 — *Dual Membership.*** No person shall simultaneously hold active membership in this and another club other than a satellite of this club. No person shall simultaneously be a member and an honorary member in this club.

**Section 6 — *Honorary Membership.***

- (a) *Eligibility for Honorary Membership.* Persons who have distinguished themselves by meritorious service in the furtherance of Rotary ideals and those persons considered friends of Rotary for their support of Rotary's cause may be elected to honorary membership in this club. The term of such membership shall be as determined by the board. Persons may hold honorary membership in more than one club.
- (b) *Rights and Privileges.* Honorary members shall be exempt from the payment of dues, shall have no vote, and shall not be eligible to hold any office in this club. Such members shall not hold classifications, but shall be entitled to attend all meetings and enjoy all the other privileges of this club. No honorary member of this club is entitled to any rights and privileges in any other club, except for the right to visit other clubs without being the guest of a Rotarian.

**Section 7 — *Holders of Public Office.*** Persons elected or appointed to public office for a specified time shall not be eligible to active membership in this club under the classification of such office. This restriction shall not apply to persons holding positions or offices in schools, colleges, or other institutions of learning or to persons who are elected or appointed to the judiciary. Members who are elected or appointed to public office for a specified period may continue as such members in their existing classifications during the period in which they hold such office.

**Section 8 — *Rotary International Employment.*** This club may retain in its membership any member employed by RI.

## **Article 11 Classifications**

**Section 1 — *General Provisions.***

- (a) *Principal Activity.* Each member shall be classified in accordance with the member's business, profession, or type of community service. 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 or that which describes the nature of the member's community service activity.
- (b) *Correction or Adjustment.* 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.

**Section 2 — *Limitations.*** This club shall not elect a person to active membership from a classification if the club already has five or more members from that classification, unless the club has more than 50 members, in which case, the club may elect a person to active membership in a classification so long as it will not result in the classification making up more than 10 percent of the club's active membership. 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, or a Rotaractor or Rotary alumnus as defined by the board of directors of RI, 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.

**Article 12 Attendance [See article 7 for exceptions to the provisions of this article.]**

**Section 1 — General Provisions.** Each member should attend this club's regular meetings, or satellite club's regular meetings if provided in the bylaws, and engage in this club's service projects, other events and activities. A member shall be counted as attending a regular meeting if the member is present in person or using an online connection for at least 60 percent of the meeting, or is present and is called away unexpectedly and subsequently produces evidence to the satisfaction of the board that such action was reasonable, or participates in the regular meeting posted on the club's website within one week following its posting, or makes up for an absence in any of the following ways:

- (a) *14 Days Before or After the Meeting.* If, within fourteen (14) days before or after the regular time for that meeting, the member
  - (1) attends at least 60 percent of the regular meeting of another club, of a satellite club meeting of another club, or of a provisional club; or
  - (2) attends a regular meeting of a Rotaract or Interact club, Rotary Community Corps, or Rotary Fellowship or of a provisional Rotaract or Interact club, Rotary Community Corps, or Rotary Fellowship; or
  - (3) attends a convention of RI, a council on legislation, an international assembly, a Rotary institute for past and present officers of RI, a Rotary institute for past, present, and incoming officers of RI, or any other meeting convened with the approval of the board of directors of RI or the president of RI acting on behalf of the board of directors of RI, a Rotary multizone conference, a meeting of a committee of RI, a Rotary district conference, a Rotary district training assembly, any district meeting held by direction of the board of directors of RI, any district committee meeting held by direction of the district governor, or a regularly announced intercity meeting of Rotary clubs; or
  - (4) is present at the usual time and place of a regular meeting or satellite club meeting of another club for the purpose of attending such meeting, but that club is not meeting at that time or place; or
  - (5) attends and participates in a club service project or a club-sponsored community event or meeting authorized by the board; or
  - (6) attends a board meeting or, if authorized by the board, a meeting of a service committee to which the member is assigned; or
  - (7) participates through a club website in an interactive activity requiring an average of 30 minutes of participation.

When a member is outside the member's country of residence for more than fourteen (14) days, the time restriction shall not be imposed so that the member may attend regular meetings or satellite club meetings in another country at any time during the



travel period, and each such attendance shall count as a valid make-up for any regular meeting missed during the member's time abroad.

- (b) *At the Time of the Meeting.* If, at the time of the meeting, the member is
- (1) traveling with reasonable directness to or from one of the meetings specified in sub-subsection (a)(3) of this section; or
  - (2) serving as an officer or member of a committee of RI, or a trustee of The Rotary Foundation; or
  - (3) serving as the special representative of the district governor in the formation of a new club; or
  - (4) on Rotary business in the employ of RI; or
  - (5) directly and actively engaged in a district-sponsored or RI- or Rotary Foundation-sponsored service project in a remote area where making up attendance is impossible; or
  - (6) engaged in Rotary business duly authorized by the board which precludes attendance at the meeting.

**Section 2 — *Extended Absence on Outposted Assignment.*** If a member will be working on an outposted assignment for an extended period of time, attendance at the meetings of a designated club at the site of the assignment will replace attendance at the regular meetings of the member's club, provided there is a mutual agreement between the two clubs.

**Section 3 — *Excused Absences.*** A member's absence shall be excused if

- (a) the absence complies with the conditions and under circumstances approved by the board. The board may excuse a member's absence for reasons which it considers to be good and sufficient. Such excused absences shall not extend for longer than twelve months. However, if the leave is for a medical reason or after the birth, the adoption, or foster care of a child that extends for more than twelve months such leave may be renewed by the board for a period of time beyond the original twelve months.
- (b) the aggregate of the member's years of age and years of membership in one or more clubs is 85 years or more, the member has been a member of one or more clubs for at least 20 years, and the member has notified the club secretary in writing of the member's desire to be excused from attendance and the board has approved.

**Section 4 — *RI Officers' Absences.*** A member's absence shall be excused if the member is a current officer of RI or a Rotarian partner of a current officer of RI.

**Section 5 — *Attendance Records.*** When a member whose absences are excused under the provision of subsection 3(a) of this article fails to attend a club meeting, the member and the member's absence shall not be included in the attendance records. In the event that a member whose absences are excused under the provisions of subsection 3(b) or section 4 of this article attends a club meeting, the member and the member's attendance shall be included in the membership and attendance figures used to compute this club's attendance.

## **Article 13 Directors and Officers and Committees**

**Section 1 — *Governing Body.*** The governing body of this club shall be the board constituted as the bylaws may provide.

**Section 2 — *Authority.*** The board shall have general control over all officers and committees and, for good cause, may declare any office vacant.

**Section 3 — *Board Action Final.*** The decision of the board in all club matters is final, subject only to an appeal to the club. However, as to a decision to terminate membership, a member, pursuant to article 15, section 6, may appeal to the club, request mediation, or request arbitration. If appealed, a decision of the board shall be reversed only by a two-thirds vote of the members present, at a regular meeting specified by the board, provided a quorum is present and notice of the appeal has been given by the secretary to each member at least five (5) days prior to the meeting. If an appeal is taken, the action taken by the club shall be final.

**Section 4 — *Officers.*** The club officers shall be a president, the immediate past president, a president-elect, a secretary, and a treasurer, and may include one or more vice-presidents, all of whom shall be members of the board. The club officers shall also include a sergeant-at-arms, who may be a member of the board as the bylaws shall provide. Club officers shall regularly attend satellite club meetings.

**Section 5 — *Election of Officers.***

- (a) *Terms of Officers other than President.* Each officer shall be elected as provided in the bylaws. Except for the president, each officer shall take office on 1 July immediately following election and shall serve for the term of office or until a successor has been duly elected and qualified.
- (b) *Term of President.* The president shall be elected as provided in the bylaws, not more than two (2) years but not less than eighteen (18) months prior to the day of taking office and shall serve as president-nominee upon election. The nominee shall take the title of president-elect on 1 July in the year prior to taking office as president. The president shall take office on 1 July and shall serve a period of one (1) year or until a successor has been duly elected and qualified.
- (c) *Qualifications.* Each officer and director shall be a member in good standing of this club. A candidate for the office of president shall have served as a member of this club for at least one year prior to being nominated for such office, except where service for less than a full year may be determined by the district governor to satisfy the intent of this requirement. The president-elect shall attend the district presidents-elect training seminar and the district training assembly unless excused by the governor-elect. If so excused, the president-elect shall send a designated club representative who shall report back to the president-elect. If the president-elect does not attend the presidents-elect training seminar and the district training assembly and has not been excused by the governor-elect or, if so excused, does not send a designated club representative to such meetings, the president-elect shall not be able to serve as club president. In such event, the current president shall continue to serve until a successor who has attended a presidents-elect training seminar and district training assembly or training deemed sufficient by the governor-elect has been duly elected.

**Section 6 — *Governance of a Satellite Club of This Club (When Applicable).*** A satellite club shall be located in the same locality as this club or in the surrounding area.

- (a) *Satellite Club Oversight.* This club shall provide such general oversight and support of a satellite club as is deemed appropriate by the board.

- (b) *Satellite Club Board.* For the day-to-day governance of a satellite club, it shall have its own annually elected board drawn from its members and comprising the officers of the satellite club and four to six other members as the bylaws shall provide. The highest officer of the satellite club shall be the chair and other officers shall be the immediate past chair, the chair-elect, the secretary and the treasurer. The satellite board shall be responsible for the day-to-day organization and management of the satellite club and its activities in accordance with Rotary rules, requirements, policies, aims and objectives under the guidance of this club. It shall have no authority within, or over, this club.
- (c) *Satellite Club Reporting Procedure.* A satellite club shall, annually, submit to the president and board of this club a report on its membership, its activities and programs, accompanied by a financial statement and audited accounts, for inclusion in this club's reports for its annual general meeting and such other reports as may, from time to time, be required by this club.

**Section 7 — Committees.** This club should have the following committees:

- Club Administration
- Membership
- Public Image
- Rotary Foundation
- Service Projects

Additional committees may be appointed as needed.

## **Article 14 Dues**

Every member shall pay annual dues as prescribed in the bylaws.

## **Article 15 Duration of Membership**

**Section 1 — Period.** Membership shall continue during the existence of this club unless terminated as hereinafter provided.

**Section 2 — Automatic Termination.**

- (a) *Membership Qualifications.* Membership shall automatically terminate when a member no longer meets the membership qualifications, except that
- (1) the board may grant a member moving from the locality of this club or the surrounding area a special leave of absence not to exceed one (1) year to enable the member to visit and become known to a Rotary club in the new community if the member continues to meet all conditions of club membership;
  - (2) the board may allow a member moving from the locality of this club or the surrounding area to retain membership if the member continues to meet all conditions of club membership.
- (b) *How to Rejoin.* When the membership of a member has terminated as provided in subsection (a) of this section, such person, provided such person's membership was in good standing at the time of termination, may make new application for membership, under the same or another classification.
- (c) *Termination of Honorary Membership.* Honorary membership shall automatically terminate at the end of the term for such membership as determined by the board.

However, the board may extend an honorary membership for an additional period.  
The board may revoke an honorary membership at any time.

**Section 3 — Termination – Non-payment of Dues.**

- (a) *Process.* Any member failing to pay dues within thirty (30) days after the prescribed time shall be notified in writing by the secretary at the member's last known address. If the dues are not paid on or before ten (10) days of the date of notification, membership may terminate, subject to the discretion of the board.
- (b) *Reinstatement.* The board may reinstate the former member to membership upon the former member's petition and payment of all indebtedness to this club. However, no former member may be reinstated to active membership if the former member's classification is in conflict with article 11, section 2.

**Section 4 — Termination – Non-attendance.** [See article 7 for exceptions to the provisions of this section.]

- (a) *Attendance Percentages.* A member must
  - (1) attend or make up at least 50 percent of club regular meetings or satellite club meetings, or engage in club projects, other events and activities for at least 12 hours in each half of the year, or a proportionate combination of both;
  - (2) attend at least 30 percent of this club's regular meetings or satellite club meetings, or engage in club projects, other events and activities in each half of the year (assistant governors, as defined by the board of directors of RI, shall be excused from this requirement).

If a member fails to attend as required, the member's membership may be subject to termination unless the board consents to such non-attendance for good cause.

- (b) *Consecutive Absences.* Unless otherwise excused by the board for good and sufficient reason or pursuant to article 12, sections 3 or 4, each member who fails to attend or make up four consecutive regular meetings shall be informed by the board that the member's non-attendance may be considered a request to terminate membership in this club. Thereafter, the board, by a majority vote, may terminate the member's membership.

**Section 5 — Termination – Other Causes.**

- (a) *Good Cause.* The board may terminate the membership of any member who ceases to have the qualifications for membership in this club or for any good cause by a vote of not less than two-thirds of the board members present and voting, at a meeting called for that purpose. The guiding principles for this meeting shall be article 10, section 1; The Four-Way Test; and the high ethical standards that one should hold as a Rotary club member.
- (b) *Notice.* Prior to taking any action under subsection (a) of this section, the member shall be given at least ten (10) days' written notice of such pending action and an opportunity to submit a written answer to the board. The member shall have the right to appear before the board to state the member's case. Notice shall be by personal delivery or by registered letter to the member's last known address.
- (c) *Filling Classification.* When the board has terminated the membership of a member as provided for in this section, this club shall not elect a new member under the former member's classification until the time for hearing any appeal has expired and the decision of this club or of the arbitrators has been announced. However, this provision shall not apply if, by election of a new member, the

number of members under the said classification would remain within provided limitations even if the board's decision regarding termination is reversed.

**Section 6 — *Right to Appeal, Mediate or Arbitrate Termination.***

- (a) *Notice.* Within seven (7) days after the date of the board's decision to terminate or suspend membership, the secretary shall give written notice of the decision to the member. Within fourteen (14) days after the date of the notice, the member may give written notice to the secretary of the intention to appeal to the club, request mediation, or to arbitrate as provided in article 19.
- (b) *Date for Hearing of Appeal.* In the event of an appeal, the board shall set a date for the hearing of the appeal at a regular club meeting to be held within twenty-one (21) days after receipt of the notice of appeal. At least five (5) days' written notice of the meeting and its special business shall be given to every member. Only members shall be present when the appeal is heard.
- (c) *Mediation or Arbitration.* The procedure utilized for mediation or arbitration shall be as provided in article 19.
- (d) *Appeal.* If an appeal is taken, the action of the club shall be final and binding on all parties and shall not be subject to arbitration.
- (e) *Decision of Arbitrators or Umpire.* If arbitration is requested, the decision reached by the arbitrators or, if they disagree, by the umpire shall be final and binding on all parties and shall not be subject to appeal.
- (f) *Unsuccessful Mediation.* If mediation is requested but is unsuccessful, the member may appeal to the club or arbitrate as provided in subsection (a) of this section.

**Section 7 — *Board Action Final.*** Board action shall be final if no appeal to this club is taken and no arbitration is requested.

**Section 8 — *Resignation.*** The resignation of any member from this club shall be in writing, addressed to the president or secretary. The resignation shall be accepted by the board if the member has no indebtedness to this club.

**Section 9 — *Forfeiture of Property Interest.*** Any person whose club membership has been terminated in any manner shall forfeit all interest in any funds or other property belonging to this club if, under local laws, the member may have acquired any right to them upon joining the club.

**Section 10 — *Temporary Suspension.*** Notwithstanding any provision of this constitution, if in the opinion of the board

- (a) credible accusations have been made that a member has refused or neglected to comply with this constitution, or has been guilty of conduct unbecoming a member or prejudicial to the interests of the club; and
- (b) those accusations, if proved, constitute good cause for terminating the membership of the member; and
- (c) it is desirable that no action should be taken in respect of the membership of the member pending the outcome of a matter or an event that the board considers should properly occur before such action is taken by the board; and
- (d) that in the best interests of the club and without any vote being taken as to his or her membership, the member's membership should be temporarily suspended and the member should be excluded from attendance at meetings and other activities of this club and from any office or position the member holds within the club;

the board may, by a vote of not less than two-thirds of the board, temporarily suspend the member as aforesaid for a reasonable period of time not to exceed 90 days and on such further conditions as the board determines. A suspended member may appeal or refer to mediation or arbitration the suspension as provided in article 15, section 6. During the suspension, the member shall be excused from fulfilling attendance responsibilities. Prior to the expiration of the suspension period, the board must either proceed to terminate the membership of the suspended Rotarian or reinstate the suspended Rotarian to full regular status.

## **Article 16 Community, National, and International Affairs**

**Section 1 — *Proper Subjects.*** The merits of any public question involving the general welfare of the community, the nation, and the world are of concern to the members of this club and shall be proper subjects of fair and informed study and discussion at a club meeting for the enlightenment of its members in forming their individual opinions. However, this club shall not express an opinion on any pending controversial public measure.

**Section 2 — *No Endorsements.*** This club shall not endorse or recommend any candidate for public office and shall not discuss at any club meeting the merits or demerits of any such candidate.

**Section 3 — *Non-Political.***

- (a) *Resolutions and Opinions.* This club shall neither adopt nor circulate resolutions or opinions, and shall not take action dealing with world affairs or international policies of a political nature.
- (b) *Appeals.* This club shall not direct appeals to clubs, peoples, or governments, or circulate letters, speeches, or proposed plans for the solution of specific international problems of a political nature.

**Section 4 — *Recognizing Rotary's Beginning.*** The week of the anniversary of Rotary's founding (23 February) shall be known as World Understanding and Peace Week. During this week, this club will celebrate Rotary service, reflect upon past achievements, and focus on programs of peace, understanding, and goodwill in the community and throughout the world.

## **Article 17 Rotary Magazines**

**Section 1 — *Mandatory Subscription.*** Unless, in accordance with the bylaws of RI, this club is excused by the board of directors of RI from complying with the provisions of this article, each member shall, for the duration of membership, subscribe to the official magazine or to the magazine approved and prescribed for this club by the board of directors of RI. Two Rotarians residing at the same address have the option to subscribe jointly to the official magazine or the Rotary magazine approved and prescribed by the board for their club or clubs. The subscription shall be paid on such dates as established by the board for the payment of per capita dues for the duration of membership in this club.

**Section 2 — *Subscription Collection.*** The subscription shall be collected by this club from each member in advance and remitted to the Secretariat of RI or to the office of such regional publications as may be determined by the board of directors of RI.

## **Article 18 Acceptance of Object and Compliance with Constitution and Bylaws**

By payment of dues, a member accepts the principles of Rotary as expressed in its object and submits to and agrees to comply with and be bound by the constitution and bylaws of this club, and on these conditions alone is entitled to the privileges of this club. Each member shall be subject to the terms of the constitution and bylaws regardless of whether such member has received copies of them.

## **Article 19 Arbitration and Mediation**

**Section 1 — *Disputes.*** Should any dispute, other than as to a decision of the board, arise between any current or former member(s) and this club, any club officer or the board, on any account whatsoever which cannot be settled under the procedure already provided for such purpose, the dispute shall, upon a request to the secretary by any of the disputants, either be resolved by mediation or settled by arbitration.

**Section 2 — *Date for Mediation or Arbitration.*** In the event of mediation or arbitration, the board shall set a date for the mediation or arbitration, in consultation with disputants, to be held within twenty-one (21) days after receipt of the request for mediation or arbitration.

**Section 3 — *Mediation.*** The procedure for such mediation shall be that recognized by an appropriate authority with national or state jurisdiction or be that recommended by a competent professional body whose recognized expertise covers alternative dispute resolution or be that recommended by way of documented guidelines determined by the board of RI or the trustees of The Rotary Foundation. Only a member of a Rotary club may be appointed as mediator(s). The club may request the district governor or the governor's representative to appoint a mediator who is a member of a Rotary club and who has appropriate mediation skills and experience.

(a) *Mediation Outcomes.* The outcomes or decisions agreed between the parties as a result of mediation shall be recorded and copies held by each party, the mediator(s) and one copy given to the board and to be held by the secretary. A summary statement of outcomes acceptable to the parties involved shall be prepared for the information of the club. Either party, through the president or secretary, may call for further mediation if either party has retracted significantly from the mediated position.

(b) *Unsuccessful Mediation.* If mediation is requested but is unsuccessful, any disputant may request arbitration as provided in section 1 of this article.

**Section 4 — *Arbitration.*** In the event of a request for arbitration, each party shall appoint an arbitrator and the arbitrators shall appoint an umpire. Only a member of a Rotary club may be appointed as umpire or as arbitrator.

**Section 5 — *Decision of Arbitrators or Umpire.*** If arbitration is requested, the decision reached by the arbitrators or, if they disagree, by the umpire shall be final and binding on all parties and shall not be subject to appeal.

## **Article 20 Bylaws**

This club shall adopt bylaws not inconsistent with the constitution and bylaws of RI, with the rules of procedure for an administrative territorial unit where established by RI, and with this constitution, embodying additional provisions for the government of this club. Such bylaws may be amended from time to time as therein provided.

**Article 21 Interpretation**

Throughout this constitution, the terminology “mail,” “mailing,” and “ballot-by-mail” will include utilization of electronic mail (e-mail) and internet technology to reduce costs and increase responsiveness.

**Article 22 Amendments**

**Section 1** — *Manner of Amending.* Except as provided in section 2 of this article, this constitution may be amended only by the council on legislation in the same manner as is established in the bylaws of RI for the amendment of its bylaws.

**Section 2** — *Amending Article 2 and Article 4.* Article 2 (Name) and Article 4 (Locality of the Club) of the constitution shall be amended at any regular meeting of this club, a quorum being present, by the affirmative vote of not less than two-thirds of all voting members present and voting, provided that notice of such proposed amendment shall have been mailed to each member and to the governor at least ten (10) days before such meeting, and provided further, that such amendment shall be submitted to the board of directors of RI for its approval and shall become effective only when so approved. The governor may offer an opinion to the board of directors of RI regarding the proposed amendment.



## Sample Club By-Laws

## RECOMMENDED ROTARY CLUB BYLAWS

### Bylaws of the Rotary Club of \_\_\_\_\_

*Club bylaws supplement the Standard Rotary Club Constitution and establish common club practices. The bylaws in this document are recommendations. Customize them to reflect your club's practices, and confirm that they are not in conflict with the RI Constitution and Bylaws, the Standard Rotary Club Constitution (except where permitted), and the Rotary Code of Policies. Articles that your club is required to include are noted below.*

#### **Article 1 Definitions**

1. Board: The club's board of directors
2. Director: A member of the club's board of directors
3. Member: A member of the club, other than an honorary member
4. Quorum: The minimum number of participants who must be present when a vote is taken:  
one-third of the club's members for club decisions and a majority of the  
directors for club board decisions
5. RI: Rotary International
6. Year: The 12-month period that begins on 1 July

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*Your club may choose how it defines a quorum for voting purposes.*

#### **Article 2 Board**

The governing body of this club is its board of directors, consisting of, at a minimum, the president, immediate past president, president-elect, secretary, and treasurer.

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*The Standard Rotary Club Constitution requires a club's bylaws to include article 2. The officers listed above are required to be members of the club board. Your club's board may have additional members, such as the vice president, the president-nominee, sergeant-at-arms, or other directors. If your club has satellite clubs, list their club board members in this article, also.*

#### **Article 3 Elections and Terms of Office**

Section 1 — One month before elections, members nominate candidates for president, vice president, secretary, treasurer, and any open director positions. The nominations may be presented by a nominating committee, by members from the floor, or both.

Section 2 — The candidate who receives a majority of the votes for each office is declared elected to that office.

Section 3 — If any officer or board member vacates his or her position, the remaining members of the board will appoint a replacement.

Section 4 — If any officer-elect or director-elect vacates a position, the remaining members of the board-elect will appoint a replacement.

Section 5 — The terms of office for each role are:

President — one year  
Vice President — \_\_\_\_\_  
Treasurer — \_\_\_\_\_  
Secretary — \_\_\_\_\_  
Sergeant-at-arms — \_\_\_\_\_  
Director — \_\_\_\_\_

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*The Standard Rotary Club Constitution requires that your club's bylaws specify an election process. If a nominating committee is used, include details of how it is appointed. The term of office for a club president is specified as one year in the Standard Rotary Club Constitution.*

#### **Article 4 Duties of the Officers**

Section 1 — The president presides at club and board meetings.  
Section 2 — The immediate past president serves as a director on the club board.  
Section 3 — The president-elect prepares for his or her year in office and serves as a director.  
Section 4 — The vice president presides at club and board meetings when the president is absent.  
Section 5 — A director attends club and board meetings.  
Section 6 — The secretary keeps membership and attendance records.  
Section 7 — The treasurer oversees all funds and provides an annual accounting of them.  
Section 8 — The sergeant-at-arms maintains order in club meetings.

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*See Rotary club leader manuals for details on the roles of club officers.*

#### **Article 5 Meetings**

Section 1 — An annual meeting of this club is held no later than 31 December to elect the officers and directors who will serve for the next Rotary year.  
Section 2 — This club meets as follows: \_\_\_\_\_. Reasonable notice of any change or cancellation of the regular meeting will be given to all club members.  
Section 3 — Board meetings are held each month. Special meetings of the board are called with reasonable notice by the president or upon the request of two directors.

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*The Standard Rotary Club Constitution requires club bylaws to include article 5, section 2.*

#### **Article 6 Dues**

Annual club dues are \_\_\_\_\_. They are paid as follows: \_\_\_\_\_. Annual club dues include RI per capita dues, a subscription to The Rotarian or a Rotary regional magazine, district per capita dues, club fees, and any other Rotary or district per capita assessment.

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*The Standard Rotary Club Constitution requires club bylaws to include article 6.*

#### **Article 7 Method of Voting**

The business of this club is conducted by voice vote or a show of hands except in the election of

officers and directors, which is conducted by ballot. The board may also provide a ballot for a vote on some resolutions.

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*Include satellite club voting procedures here.*

## **Article 8 Committees**

Section 1 — Club committees coordinate their efforts to achieve the club's annual and long-term goals. Each club should have the committees listed in article 13, section 7, of the Standard Rotary Club Constitution.

Section 2 — The president is an ex officio member of all committees and, as such, has all the privileges of membership.

Section 3 — Each committee's chair is responsible for the regular meetings and activities of the committee, supervises and coordinates its work, and reports to the board on all committee activities.

## **Article 9 Finances**

Section 1 — Before each fiscal year starts, the board prepares an annual budget of estimated income and expenditures.

Section 2 — The treasurer deposits club funds in a financial institution or institutions designated by the board, divided into two accounts: one for club operations and one for service projects.

Section 3 — Bills are paid by the treasurer or another authorized officer and approved by two other officers or directors.

Section 4 — A qualified person conducts a thorough annual review of all financial transactions.

Section 5 — Club members will receive an annual financial statement of the club.

Section 6 — The fiscal year is from 1 July to 30 June.

## **Article 10 Method of Electing Members**

Section 1 — A member proposes a candidate for membership to the board, or another club proposes one of its transferring or former members.

Section 2 — The board approves or rejects the candidate's membership within 30 days and notifies the proposing member of its decision.

Section 3 — If the board approves the candidate's membership, the prospective member is invited to join the club.

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*A process to address objections raised by current members may also be included here.*

## **Article 11 Amendments**

These bylaws may be amended at any regular club meeting. Changing the club bylaws requires sending written notice to each member 10 days before the meeting, having a quorum present for the vote, and having two-thirds of the votes support the change. Changes to these bylaws must be consistent with the Standard Rotary Club Constitution, the RI Constitution and Bylaws, and the Rotary Code of Policies.



## **Rotary International - Guidebook to Starting a Rotary Club**



# STARTING A ROTARY CLUB



**JOIN LEADERS:** [Rotary.org](https://Rotary.org)

808-EN—(317)

# 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](https://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.



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