

# 4

## Completing Required Forms for RI

The following documents are essential to apply for membership in RI:

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

All forms are available as writeable PDF forms at [www.rotary.org/downloadlibrary](http://www.rotary.org/downloadlibrary).

The district governor should review each of these documents carefully to verify the accuracy of all information and approve each form. After signing the forms, forward them to the district's RI Club and District Support (CDS) representative. A copy should be kept for the club's files.

Please note that all contact information that is required on the forms is kept in the RI database and used only for contacting the Rotarian. It is highly recommended that members' e-mail addresses be provided.

Appendix 3 contains definitions of many of the terms on these forms. Make sure to discuss Rotary terminology with the charter and sponsor club officers to better facilitate the completion of all forms. If you have any questions, contact your CDS representative. You can also find the answers to many frequently asked questions in chapter 6.





# New Club Survey

## MEMBERSHIP IN RI

To be completed by the surveyor (as designated by the district governor) and sent to the governor for approval and signature

Proposed name of new club: \_\_\_\_\_

District: \_\_\_\_\_

Community: \_\_\_\_\_

State/province/prefecture: \_\_\_\_\_

Country: \_\_\_\_\_

Please describe the various aspects of the community in each of the categories below.

RELEVANT DEMOGRAPHIC INFORMATION (*such as population or principal industries and businesses*):

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

LIST THE NAMES AND OCCUPATIONS OF PEOPLE WHO MIGHT FORM THE BASIS OF A NEW CLUB:  
(*The number of people with the same classification on a charter list is limited. For more information see RI Constitution 5.2(b).*)

CURRENT/FORMER ROTARIANS WHO WILL BE CHARTER MEMBERS (*list names and clubs*):

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

\_\_\_\_\_  
Name

\_\_\_\_\_  
Date

**NEW CLUB SURVEY PAGE 2**

To be completed by the district governor

**Sponsor Club**

Sponsoring Rotary club(s): \_\_\_\_\_

New club will not have a sponsor club.

**Special Representative**

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

Family name: \_\_\_\_\_

First name: \_\_\_\_\_ Middle name: \_\_\_\_\_

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

E-mail: \_\_\_\_\_

Mailing address *(if post office box, please provide an alternate address for courier delivery):*

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_ Postal code: \_\_\_\_\_

**District Governor's Decision**

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

\_\_\_\_\_

District Governor's Signature

Date

The district governor should forward the original to the Club and District Support representative and keep a copy for the club's files.



# Sponsor Club Form

## MEMBERSHIP IN RI

Sponsor club name: Rotary Club of \_\_\_\_\_

Sponsor club number: \_\_\_\_\_

Our membership voted on \_\_\_\_\_ to sponsor a new Rotary club,  
date

likely to be known as the Rotary Club of \_\_\_\_\_  
(community, state/province/prefecture, country/geographical area)

- Our club agrees to be the sponsor club. We will assist in its formation, help with the charter presentation ceremony, and work closely with the new club for at least one year.
- Our club currently has \_\_\_\_\_ active members.  
(A sponsor club must have a minimum of 20 members.)

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

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





# New Club Application

## MEMBERSHIP IN RI

All information requested on this form is required. Incomplete forms result in processing delays.

### Standard Rotary Club Constitution

This section corresponds with the articles of the Standard Rotary Club Constitution.

#### Article 2: Name

The name of this organization shall be (check one)

- Rotary club
- Rotary e-club

\_\_\_\_\_ (complete name, including community, state/province/prefecture, country/geographical area)

The club name should be easily identifiable on a map, so that someone unfamiliar with the area can determine the club's general location.

#### Article 3: Locality of the Club

The locality of this club is \_\_\_\_\_ and surrounding area.  
(community name)

*A locality is a geographic description of the area it serves.  
For e-clubs, the locality is considered by the RI Board to be worldwide.  
Please see pages 36 and 37 for examples of appropriate club names and localities.*

#### Article 10, Section 4: Officer Names

President \_\_\_\_\_

Secretary \_\_\_\_\_

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

Treasurer \_\_\_\_\_

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

\_\_\_\_\_

\_\_\_\_\_

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

#### Article 14: Rotary Magazines (check one)

- Everyone subscribes to *The Rotarian*.
- Some or all of our members subscribe to the following Rotary regional magazine certified by RI:  
\_\_\_\_\_, and everyone subscribes to either it or *The Rotarian*.  
(Please ensure that all charter members indicate their magazine choice on the charter member list.)

- Club is in a country excused by the RI Board from subscribing to a magazine.

**NEW CLUB APPLICATION PAGE 2**

**Weekly Meeting**

Day of week \_\_\_\_\_ Time (include official website posting time for Rotary e-clubs) \_\_\_\_\_

Name of meeting place \_\_\_\_\_

Address \_\_\_\_\_

Address \_\_\_\_\_ Postal code \_\_\_\_\_

Website URL for online meetings (Rotary e-clubs only) \_\_\_\_\_

**RI Charter Fee**

Number of charter members \_\_\_\_\_ x US\$15 = \_\_\_\_\_

Currency in which the charter fee was paid and amount: \_\_\_\_\_

*Charter fee is being paid via:*

Check\*     Money order     Fiscal agent

Bank transfer to an RI account outside USA

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

*\*Non-U.S. clubs paying by check must have their check drafted through a U.S. bank.  
(Please attach check or proof of payment.)*

**New Club Contact Information**

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

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

Phone (include country/city/area codes): \_\_\_\_\_

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

E-mail: \_\_\_\_\_

Website: \_\_\_\_\_



## NEW CLUB APPLICATION PAGE 3

### Certification

*Please read the following items carefully. Your signature certifies that this new club meets the qualifications set forth in RI's constitutional documents.*

The provisional Rotary Club of \_\_\_\_\_  
(complete name, including community, state/province/prefecture, country/geographical area)

hereby applies for membership in RI and confirms that the club

1. Will abide by the Constitution and Bylaws of RI
2. Has adopted the Standard Rotary Club Constitution prescribed by RI as the club's constitution and will abide by its provisions
3. Will always have bylaws that are in harmony with the constitutional documents of RI, including the Standard Rotary Club Constitution
4. Will not become a member of, or assume obligations of membership in, any organization other than RI
5. Shall maintain the obligations of a member club in RI and be subject to the jurisdiction of RI

The signatures of the president and secretary of this provisional club attest to this club being organized in accordance with the constitutional documents and policies of RI and that the information in this application is accurate.

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

\_\_\_\_\_  
Date

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

\_\_\_\_\_  
Date

As governor of the district, I certify that this application meets the requirements in the constitutional documents of RI and the policies of the RI Board of Directors, and I endorse this club's application for admission to the association.

- All members of the provisional Rotary club have participated in an appropriate orientation and education program under the guidance of district leaders and members of the sponsoring Rotary club.
- The club has set for its members an appropriate admission fee and an appropriate annual fee that allows the club to cover its financial obligations.
- The club has a well-balanced membership in compliance with the guidelines set forth in Article 5, Section 2 of the RI Constitution, which states in part: "Each club shall have a well-balanced membership in which no one business, profession, or type of community service predominates. The 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."
- All current or former Rotarians joining this new club have provided written proof from their current or previous clubs confirming that all debts have been paid.
- (For Rotary e-clubs only) Counting this Rotary e-club, the number of total Rotary e-clubs in the district does not exceed two.

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

\_\_\_\_\_  
Date

### Charter List

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

## CHARTER LIST

Copy this page to provide information for each member (minimum of 25 charter members).

Please type or print clearly

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

Family name: \_\_\_\_\_

First name: \_\_\_\_\_ Middle name: \_\_\_\_\_

Gender:  Male  Female

Preferred language: \_\_\_\_\_

Former/current Rotarian:  No  Yes

If yes, RI membership ID number: \_\_\_\_\_

Name of former/current club: \_\_\_\_\_

Former/current firm: \_\_\_\_\_

Position: \_\_\_\_\_

Phone (including country/city/area codes)

Fax (including country/city/area codes)

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

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

Mobile: \_\_\_\_\_

E-mail: \_\_\_\_\_

Mailing address\* (check one):

Residence  Business  Other

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

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

Alternate address: (complete only if mailing address is a P.O. Box)

Residence  Business  Other

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

Magazine:  *The Rotarian*  Rotary regional magazine