

## **CHAT ~ Developing a Satellite Club Workshop (Jan. 28, 2021)**

18:58:33 From AG Ruth Finkelstein-5910 to Everyone: Lyle mentioned that the sat club was "chartered" but Emily said they were not chartered, but had their own bylaws, was that just loose use of the word chartered?

19:00:16 From RC Dian Edwards, District 5870 to Everyone: Yes, Satellites are not formally "chartered", but their formation is documented with RI.

19:00:34 From PDG Doreen Kelsey DMC D5080 to Everyone: Thank you for the clarification.

19:01:18 From John Hannes | CDS to Everyone: To add: we try our best not to use the word "Chartered" because the satellite club doesn't pay a charter fee to have membership in the organization. If they decide to split away from their sponsor, they can apply for a charter from Rotary

19:01:18 From RMO Emily Tucker to Everyone: @AG Ruth - Satellite clubs don't receive a charter, as they're a part of the sponsor club. Once the Satellite Club Application is approved, the satellite club is officially recognized by RI. I try to use the word "formed."

19:02:09 From DMC Steve Griffith 5960 to Everyone: Does the satellite club need to have the same name as the sponsor club? Rotary Club of Small Town-Eco?

19:03:24 From John Hannes | CDS to Everyone: Great question @DMC Steve! We just clarified this language with the Board, and a satellite club no longer needs to include the sponsor's name!

19:04:11 From John Hannes | CDS to Everyone: They should, however, follow the standard naming convention for Rotary clubs, and CDS can help talk through options with interested clubs

19:05:55 From Rita Esterly D6080 to Everyone: John, can you give an example of a name?

19:06:54 From DG Tom Gump, D5950 to Everyone: I received a text question: "Where did we come up with the name "Project Phoenix 223?" Phoenix refers to the mythical creature that rises out of the ashes - and we hope our membership numbers rise too! "223" stands for February 23rd, the birthdate of Rotary. We also serve two zones and 23 districts. Thank you all for attending tonight!!!! :)

19:08:06 From John Hannes | CDS to Everyone: Sure, @Rita! Some recent satellites:

Rotary Satellite Club of Kankakee-Iroquois County

Rotary Satellite Club of Pudu Millennials, Kuala Lumpur

19:09:19 From Nguyen T. Nguyen {D5890} to Everyone: How is a Satellite Club structure looks like?

19:09:48 From Nguyen T. Nguyen {D5890} to Everyone: How is a Satellite Club Tax structure looks like?

19:09:50 From Sridhar, DGE 6220 to Everyone: This is from RI FAQ:

19:09:57 From Sridhar, DGE 6220 to Everyone: How are satellite clubs named?

Satellite clubs have the same name as the sponsor club plus a qualifier that distinguishes it from the sponsor, for example:

If the sponsor and satellite clubs meet at different times

Sponsor: Rotary Club of Bangkok North

Satellite: Rotary Satellite Club of Bangkok North Evening

If the sponsor and satellite clubs have different meeting locations

Sponsor: Rotary Club of Chicago Lakeview

Satellite: Rotary Satellite Club of Chicago Lakeview Broadway

19:12:42 From Haris Sofradzija to Everyone: Hi @Sridhar! As John said, the Board just clarified this language with the Board, and a satellite club no longer needs to include the sponsor's name! They should, however, follow the standard naming convention for Rotary clubs, and CDS can help talk through options with interested clubs.

19:12:54 From Meredith Galdeen, 5960 to Everyone: Thank you John! Great to know!

19:13:12 From Nick Taylor - CDS to Everyone: Good to be here!

19:14:14 From John Hannes | CDS to Everyone: Earlier, @Andy Eads mentioned requesting contact information for former Rotarians from Rotary. A couple of things about that request:

- 1) My own recommendation is to request as far back as the last 5 Years. We aren't always able to keep up with changes to contact information once a person leaves Rotary/Rotaract (unless they log on to their My Rotary account and update it themselves). Going back any further might result in bad data.
- 2) To request this type of information, you'll want to complete a "Request for Personal Data" form that I'm inserting here in the chat. Completed forms can be submitted by email to [data@rotary.org](mailto:data@rotary.org)

19:14:47 From Sridhar, DGE 6220 to Everyone: Haris, you are correct. One can drop the name of the Sponsor Club

19:16:41 From DG Bill Pritchard - D6250 to Everyone: Any success in having Satellite E-clubs? With our Hybrid meeting structures going on now... perhaps the e-style is a better fit?

19:17:16 From DMC Steve Griffith 5960 to Everyone: Can satellite clubs receive district/RI grants directly or do grant requests go through the sponsor club?

19:18:38 From Nguyen T. Nguyen {D5890} to Everyone: How is a Satellite Club Tax structure looks like? Do they need their own EIN# and do they need their own Treasurer to do their own tax?

19:19:11 From DG Scott Rainey 5890 to Everyone: @ Bill Pritchard - we are actually working on a satellite club of our e-club! Will be primarily an e-club also but cause based.

19:19:53 From Nobody Special Lynne McNamee D5810 to Everyone: @DG Bill I've been working on starting an e-club satellite (even prior to COVID)

19:20:28 From DG Scott Rainey 5890 to Everyone: @ Nguyen, use the sponsor clubs EIN

19:20:44 From Nick Taylor - CDS to Everyone: Hi @Bill, you make a good point. It really depends on the membership of the club. the nice thing about satellite clubs meeting online, it does allow a more flexible intro into meetings.

19:21:14 From RMO Emily Tucker to Everyone: @DG Bill, I think especially now with so many clubs having pivoted to virtual meetings or a hybrid model, there could certainly be success with satellite clubs meeting online - all depending on what the members want and need.

19:22:40 From DG Tom Gump, D5950 to Everyone: You only get one chance to say "no" to Rotary and that is before you join! :)

19:22:59 From John Hannes | CDS to Everyone: @DMC Steve: The satellite will want to work with their sponsoring club for access to grants. Their donations to the Annual Fund will count toward the goals and achievements of the sponsoring club - so the sponsor will have final say in how the funds are requested and used. As Emily identified in her section, these two groups should have a conversation early on, so that all members are on the same page

19:25:04 From Nick Taylor - CDS to Everyone: @Nguyen, great question. Because Satellite clubs are technically part of the parent club, they work under the tax information of the parent club and do not need their own EIN or to join RI's 501c4 group exemption. However, it is a good idea for them to be familiar with the steps (filing 990 for example) if they do decide to become a chartered club

19:34:30 From RC Debbie High, D5930 to Everyone: From Donald Henderson District 5930 Los Fresnos Rotary Club Texas

Key to success of satellite and then club charter:

1. Three community leaders with proven track record of helping in community
2. Mentorship from sponsor club president or officer weekly in person at meetings and phone calls
3. Engagement monthly from DG via phone, zoom or in person- We invest our time in what we love and matters to us.
4. Satellite members must take leadership immediately with sponsor attending for guidance. (like riding a bike and dad has to let go of the bike)
5. Invite your contacts who are active in the community to join your new club

19:35:05 From RMO Emily Tucker to Everyone: Just to clarify, Club Runner is a third-party database and is separate from My Rotary. While RI staff doesn't have access to or expertise with Club Runner, they have an excellent support staff as well.

19:35:53 From John Hannes | CDS to Everyone: That's right, Emily - they're a great staff! If you have questions for ClubRunner, send an email to [support@clubrunner.ca](mailto:support@clubrunner.ca) or use their contact form on their site

19:39:23 From Haris Sofradzija to Everyone: Here's a Rotary Voices blog post on a successful satellite club in Louisiana that brought diversity and new energy to Rotary in that community:

<https://blog.rotary.org/2020/09/17/sunrise-after-dark-increases-rotarys-diversity-in-louisiana/>

19:41:13 From DGE Carol Horner (she/her) 5650 to Everyone: Thanks, Haris

19:41:51 From PDG Doreen Kelsey DMC D5080 to Everyone: I'm confused by the requirement to designate a locality when we are permitted to include members from other communities, in fact, from anywhere in the world as far as I know. It what way does locality come into play?

19:43:43 From Nobody Special Lynne McNamee D5810 to Everyone: If you don't have approval yet, how can you have the website? Domain registration requires having the name and paying for the domain. And by having the website, you're going to market "as if" you are "official." What is the official positioning about this?

19:45:33 From Patricia McCleese DGND 5960 to Everyone: Thank you for all of this information.

19:46:21 From DG Tom Gump, D5950 to Everyone: The satellite club can have a simple landing page on the parent site and that works.

19:46:32 From DMC Steve Griffith 5960 to Everyone: To be clear, members of the satellite club pay RI and district dues, and then whatever club dues the sponsor club and satellite agree on. Right?

19:51:19 From John Hannes | CDS to Everyone: @Lynne - this is a great reason to reach out to CDS early in the process. We're able to help land on a name that will be approved, and you can start assembling your branded items :-D

19:51:38 From PDG Doreen Kelsey DMC D5080 to Everyone: Thank you for answering my question and thank you for all the great presentations and information. This was so valuable.

19:51:39 From Nobody Special Lynne McNamee D5810 to Everyone: Fab! I'll reach out soon

19:51:55 From Nick Taylor - CDS to Everyone: Hi @DMC Steve, RI bills the parent club for the satellite club membership and then the parent club works out the payment with the satellite club

19:52:09 From Meredith Galdeen, 5960 to Everyone: Thank you Phoenix 223 Team! This was really great!!

19:52:45 From John Hannes | CDS to Everyone: I'm dropping in a file that has the contact information for your CDS Officers - please take a look when you have questions, we're arranged by district!

19:55:36 From RMO Emily Tucker to Everyone: So great to see everyone this evening! Thanks for your participation. Feel free to reach out to me any time - Emily.Tucker@rotary.org | 847-866-3258