



The Satellite & Companion Club Handbook

A Guide to Forming, Managing and Operating Satellite or Companion Clubs in District 7600

INTRODUCTION

Our thanks and acknowledgement to District 7670 for the core content of this guide. If you understand Satellite and Companion clubs and are in the process of forming one, turn to the “**Satellite Club Task List**” on Page 6

The Satellite club initiative grew out of a need to accommodate quality individuals who had an interest in Rotary but who could not join a “traditional” Rotary Club due to financial, scheduling, distance, or other constraints. A “Companion Club” is also utilized within our district. A vision of the Satellite club model is that there is some likelihood that it may break off from its host club in the future. The Companion club concept implies that there is no intention of breaking off from its host club. To make this guide easier for our clubs, we will refer to the “Satellite club” concept, but the process remains identical for forming and operating Companion clubs.

District 7600 has experienced an increasing amount of interest in forming Satellite clubs to grow membership and provide access to potential Rotarians in our District. This focus on making Rotary more flexible and therefore more accessible has the potential of significantly growing membership in Rotary with quality individuals.

This **Satellite Handbook is a guide**, not a policy book, for Rotary clubs throughout the district who are considering the Satellite option as well as for those clubs with existing Satellites. However, there are qualifications set forth by the District and RI.

- I. Historically, the two major impediments to joining Rotary have been financial resources and time availability. While there is no shortage of potential Rotarians, there is a shortage of people who are willing or able to conform to the financial and time requirements that have traditionally been part of belonging to Rotary. Satellites address both impediments.
- II. Fees can be reduced because the Satellite can opt to have no required meals – by far the largest financial component for most Rotarians.
- III. The meeting time, location and meeting frequency components for the Satellite will be determined by Club leadership and the members of the Satellite.
- IV. The Satellite initiative represents a change of approach and attitude. Implementing and launching a Satellite is not a guarantee to dramatically increase membership in every Rotary club. It is quite a simple and straightforward concept that is working for multiple clubs in multiple Districts.

The Satellite membership initiative can provide a Rotary club with:

- A new strategy to increase its membership.
- Access to potential Rotarians who are not able to fit into the current or traditional model of Rotary clubs.
- The opportunity for a group of Rotarians connected by geography, demographics, culture, vocation, or intellectual interest to develop their own initiatives.
- An innovative approach with flexibility regarding meeting time, location, dues and more. The Satellite option is available for clubs which are looking to increase or improve:
 - Club membership, recruitment, and engagement with retention as a by-product.
 - Membership engagement and participation in club activities.
 - Leadership opportunities for club members.
 - Gender balance within a club's membership.
 - Club outreach throughout the community they serve.
 - Support to The Rotary Foundation through participation in programs and contributions.
 - Successful service projects, both locally and international.

It is important to stress the Satellite option is not the right answer for every club – certainly not for a club with existing leadership challenges. Satellite formation, management, and operation requires a significant amount of time and ongoing effort by the “host club” and should not be considered the “quick fix” or a silver bullet to growing membership. Regardless of whether a Rotarian's membership is in a traditional Rotary club or a Satellite, the focus will always be on “Service Above Self,” Rotary International's guiding principles, Avenues of Service, Areas of Focus, and complemented by personal and professional networking.

It is important to remember that a Satellite is part of the host club; it is not its own Rotary club. Members of Satellites are full-fledged members of the host club and have all the privileges, duties, and rights of a member of the host club.

SATELLITES – WHAT THEY ARE AND WHAT THEY ARE NOT

A Satellite is:

- A way to attract a different demographic to Rotary or sub-group of individuals.
- A way to be innovative and re-imagine what we have traditionally thought of as Rotary.
- A way to re-energize Rotary!

A Satellite is not:

- A silver bullet for growing membership.
- A sub-standard form of membership in Rotary. Satellite members have the same responsibilities as other members and share the same interest in “Service Above Self.”
- A separate club. All Satellite members are, by Rotary International standards, full-fledged members of the host club.

Why is there a **need for Satellites**?

- A club that is unwilling to grow because it is “just the right size now.”
- Declining membership at the club, district, and zone levels.
- Struggle in net growth of membership regardless of the club size.
- Certain essential individuals and groups are unable to join Rotary because of meeting logistics and required financial investment.
- **Most Importantly**, serving demographics and geography unreachable by the host club’s “product.”

WHO IN YOUR COMMUNITY WOULD BENEFIT FROM A SATELLITE?

Target areas or populations for Satellites:

- Young professionals
- Workplace - this may include any company or organization such as plants, educators, large health care facilities, etc.
- Mergers with small, struggling clubs.
- Geography where a current club does not exist.
- Different time of day.
- Individuals who find the financial requirements of a traditional club challenging.
- Alternative to eClub format or the addition of an eClub format.
- Individuals living in a senior or retirement community.
- People with a common interest such as a hobby.
- Group of people who wish to dedicate their service to a specific cause, such as an illness or disease.
- Impact club model, where this club participates in frequent community service projects and does not intend to hold meetings.

OPTIONS FOR A SATELLITE

A Satellite will always have the option of remaining a Satellite and part of the host club. A Satellite may also decide to apply for and charter its own new Rotary club. A Satellite may begin with the intention of later chartering as its own Rotary club; however, this is not a requirement. Satellites may choose to remain Satellites forever.

A Satellite can serve as an excellent incubator for formation of a new Rotary club. The chartering process for Satellites to become a new club is the same as one starting completely from scratch via the District Extension Committee and meeting RI’s extension requirements. A positive aspect to forming a Satellite that will later charter as its own club is that much of the infrastructure will already exist.

FORMING A SATELLITE

It is extremely important that our host clubs and their respective Satellites start off on the right foot to create a viable and sustainable Satellite. To ensure success, the following are **administrative guidelines** from District 7600, and the District Membership Committee (DMC), or Innovative Club Advocate (ICA):

- The host club formulates the rules on how their Satellite will operate. The DMC and ICA are advisors – the district has no “Satellite rules.” This is a club initiative and not a District, Zone, or Rotary International initiative. Each club makes its own rules about dues, meeting time/place, service projects, etc.
- All Satellite members are required to pay Rotary International and District 7600 dues, as administered by the host club. Beyond those obligations, it is up to the Satellite and its host club to determine the dues structure for each member.
- All Satellite members are to be recorded in District and Rotary’s databases as a member of the host club. Members can be designated as “Active” or “Active-Satellite” in DACdb. Either way, they are considered Active members of Rotary International.

MANAGING A SATELLITE

- The host club provides general oversight and support of a Satellite as deemed appropriate by the Board of Directors
- For the day-to-day governance of a Satellite, it has its own annually elected leadership drawn from its members. The highest officer of the Satellite can be the “Chair” and other officers may include the Immediate Past Chair & Chair-Elect. The Satellite may have key Committee Chairs, such as Membership, Foundation, Programs, Service Projects, but not required.
- The Satellite’s leadership is responsible for the day-to-day organization and management of the Satellite and its activities in accordance with Rotary rules, requirements, policies, aims and objectives under the guidance of the host club.
- A Satellite operates under the Constitution, By-Laws, and rules of the host club unless both clubs agree to special by-laws and rules, which may be enacted for the Satellite.
- The Satellite does not have any direct official business or contact with Rotary International. All official Rotary business is facilitated through the host club.
- A Satellite and its officers can potentially have special access to Rotary databases, this is determined in concert with the host club. Individual members have access to “My Rotary.” Satellite members, officers and committee chairs have access to DACdb data like those in any club.
- The host club members and its Satellite members should meet on a regular basis, such as once per quarter, which may be a service project or social event.
- The Board of the host club has the final authority when disagreements occur.
- The host club remains responsible for all Rotary administrative functions of the Satellite including dues collection and the handling of all fundraising proceeds and grant funds.
- The host club’s “mentor” to the Satellite should continue to attend the new Satellite’s meeting for at least twelve months, ideally for the first few years. The President and Board members of the host club should assist their counterparts in the Satellite.
- The host club, after deciding to establish a Satellite, must allow the Satellite to find its own place and set its own rhythm, traditions, and procedures.

RECOMMENDED BEST PRACTICES FOR SATELLITE OPERATION

- The host club should have at least one member, preferably two, who serve as mentors to the Satellite.
- Members of the Satellite should serve on relevant committees of the host club.
- The Satellite should meet at least **twice per month** at which time Rotary business can be discussed. If the Satellite is being formed as an “Impact Club,” meetings are not required since this club type is dedicated to performing community service activities frequently.
- Satellites should also provide additional regular opportunities for service, fellowship, and Rotary engagement.
- A Satellite should be encouraged by the host club’s mentors to establish a simple management structure to help the Satellite in organizing its activities. Satellites are encouraged to elect a Chair, Co-Chair, Secretary and Sgt At Arms.
- Members of the Satellite should be eligible for leadership roles within the host club. The host club may elect to revisit its by-laws, with amendments to them to make it possible for a Satellite member to serve in a leadership role. (Note: All Club Constitution and By-laws changes must be approved by the host club Board of Directors and club membership, based on current club requirements.)
- Satellite members should **remain visible to the host club**. Satellites should encourage their members to attend at least one (1) host club meeting or function per quarter.
- Host club members should attend a Satellite meeting and/or participate in a service project or fellowship event. Interaction and collaboration between host club and Satellite members is important for the success of the entire Rotary club as it increases cohesion amongst members and momentum for the host club and Satellite.
- Host club mentors and Satellite chairs should maintain open lines of communication and reach out to the District Membership Committee with any challenges or questions.
- Satellite members should be encouraged to attend Rotary Leadership Institute (RLI). While it is important for all Rotarians to attend RLI, it may be even more impactful for Satellite members since potentially they will have less exposure to experienced Rotarians.
- The Satellite is strongly encouraged to set its own goals at all levels of service.
- It is highly recommended that the Chair of the Satellite be a member of the host club’s Board.
- The Satellite should meet on a different day, at a different time, or at a different location from the host club.
- Each prospective member is required to submit a member application as outlined in the club’s membership process.
- There is a minimum of eight members required and no maximum, however the Satellite should be capable of operating independently. District 7600 strongly suggests forming a Satellite with at least twelve members.
- The privileges and obligations of Rotary membership apply equally regardless of which club they attend.

SATELLITE CLUB TASK LIST

Here are specific action plans and decisions needed to get a Satellite club launched. Each item below represents a “checklist” item where a decision or activity is needed. This list can be altered, as items may be decided or executed in parallel or in a different order:

Board Action – The host club’s Board must vote to form and support each Satellite club. The vote should be recorded in the Board meeting minutes.

Bylaws Review – Establish a small committee to review the host club bylaws, make necessary changes to support and govern the Satellite club.

- Start by comparing the club’s existing bylaws with Rotary International’s recommended Club Bylaws.
- The Satellite club should be represented on the host club’s board (by the Satellite Chair).
- A Satellite may have its own bylaws, or its governance can be defined within the host club’s bylaws.

Satellite Mentors(s) – Select one or more experienced Rotarians who will take responsibility for helping, supporting, and mentoring the new Satellite. This role should continue for 1-2 years, tapering in engagement as the Satellite leadership team gains experience and depth.

Satellite Chair & Chair Elect – Leadership is essential to Satellite success. Early in the game, a Chair and Chair-Elect need to be identified and committed to leading the Satellite. The charter Chair should be committed to the balance of the current Rotary year, plus the full subsequent year. Changing leadership members a few months after forming is not recommended.

Other Leadership roles – The Satellite may have other functional leaders to share the workload and to develop a bench of future leadership, such as:

- Membership Chair
 - Define Intentional Strategies for membership growth.
 - Teach members how to attract additional members.
 - Program Chair coordinates a high-value program for each meeting.
 - Liaison to Program speakers.
 - Foundation Chair - become knowledgeable of The Rotary Foundation
 - Promote Rotary Foundation support as an expectation of all Rotarians.
 - Administration Chair interfaces with host club Secretary or Administrator.

Dues Structure – The host club Board establishes the dues structure for the Satellite. Dues are billed and collected by the host club Treasurer. A separate bank account for the Satellite is neither needed nor recommended. The Satellite is an extension of the host club, and its financial activities are consolidated into the host’s books and reported on the host’s tax return (Form 990).

- Dues for Satellite members can be the same, higher, or lower than Active members of the host club. Allow for Rotary International dues, District dues, plus some headroom for the club.
- If the host bills members for The Rotary Foundation's Sustaining Membership (\$25/quarter or \$100/year), it may wish to do the same for the Satellite members. Likewise for a club's local Foundation.
- The host club's Treasurer may segregate fundraising income for the Satellite, reserved for use in the Satellite's service projects.
- Initiation Fees may be zero, less than or more than the host clubs.

Club Type – Satellite clubs can be simply alternate time/location clubs, focused on a specific demographic (young professionals, non-English speakers, etc.), or caused based (environment, social justice, veterans, etc.). Or any combination thereof.

Meeting place/time – These choices can be made and changed by the Satellite's leadership.

The dominant model for Satellite clubs, in general has been:

- Non-Meal – Reduces the impediment time and expense commitment.
- After Hours – Opens prospect reach to where people **live** vs. where they **work**.
- Meeting Place – Satellites can meet in or near establishments offering food/beverage service. Members can conveniently gather before or after the meeting, on their own, to extend fellowship and networking beyond the club meeting itself.
- Meeting Frequency – Some Satellites meet weekly – twice a month is more common.
- Meeting Frequency for Impact Club-types: No meetings required, focusing on service projects solely.

Organizational Meeting – Plan sessions like a Rotary Information Hour (Discover Rotary) for prospective Satellite members. If a Chair has been identified, he/she should take part in the presentation, otherwise the Satellite's mentor(s) can conduct it.

Onboard new Satellite members and plan the Satellite's first meeting once a critical mass of members (12 to 15) have been inducted.

- A Satellite requires a minimum of eight members to form. However, we recommend not forming one until a minimum of twelve members have committed, and ideally fifteen.
 - Any new club forming will likely lose 10% of its members after one year. If a club forms with eight members, it will likely have 6 or 7 at the end of the first year. If a club forms with fifteen, they will likely have about thirteen members at the end of the year. A club with thirteen members is more likely to attract new members than a club of 6 to 7.

LAUNCH YOUR NEW SATELLITE

The initial induction of Satellite members may be done at the Satellite meeting or a host club meeting. This is a big celebration for the host club and its new Satellite. District leadership should be invited to join in the celebration and be there to recognize this moment in the host club's history.

Satellites should provide a regular **orientation program** for all new members to ensure appropriate education about the history and function of Rotary, its Foundations (Rotary International and club) and the programs of the host club. It is up to the host club and Satellite leaders as to the format and timeline of Rotary orientation. It is also important to "know your audience" (i.e., new Satellite members) to orient and educate them in the way that fits them best.

ADDENDUM A

Rotary 101 – Orientation, Education and Guidance

Orientation suggestions can come from the host club as well as the District Membership Committee or Innovative Club Advocate and its resources. See Addendum C for a brief outline of recommended topics educating a new Satellite Rotarian, or any new Rotarian for that matter!

Rotary Development & Leadership Training

Satellite leadership is encouraged to participate in any **leadership training**; including President Elect Training Seminar (PETS), the District recommends that newly formed Satellites send their chairs to at least one (1) leadership training opportunity to become familiar with the ideals of Rotary, the expectations of Rotary clubs in District 7600, and the lessons learned from other clubs.

Examples of leadership and role training include (in no particular order):

- Rotary Leadership Institute (RLI)
- District Leadership Seminar
- District Conference

ADDENDUM B – GLOSSARY OF SATELLITE TERMS

Host Club – The existing Rotary club that creates, mentors, and collaborates with its Satellite.

District Membership Committee (DMC) – A team of Rotarians in District 7600 who oversee membership growth and retention with the express purpose of being a resource for club membership chairs, clubs, Assistant Governors, and the District Governor chain.

Satellite Club – A strategy for increasing and strengthening a club’s membership by organizing a group of Rotarians (new and existing) who meet at a different time and place, and oftentimes have lower dues than the host club. A member of a Satellite is a full-fledged, dues paying Rotarian of the host club, with all the rights, privileges and obligations of the other Rotarians belonging to the host club. Again, this club type can also be considered a “Companion Club.”

Innovative Club Advocate – A member of the Zone 33 and District 7600 Membership Committee (DMC) who is designated to focus strictly on advising and supporting potential and existing Satellites.

Satellite Mentor – A member of the Host Club who is designated to focus strictly on advising and supporting the Satellite club.

ADDENDUM C

ROTARY 101 OUTLINE – Each Satellite should provide the following information:

- 1) Structure of Rotary
 - a) Approximately 1.2 million Rotarians in over two hundred countries
- 2) Over 36,000 Clubs
- 3) 532 Districts
 - a) 50-100 Clubs per District
 - b) 10-18 Areas per District

- 4) 34 Zones
- 5) Rotary International
 - a) Rotaract & Interact club types.
 - b) No affiliation with religion or politics.
 - c) History
 - d) Websites
- 6) Guiding Principles
 - a) Object of Rotary
 - b) Four-Way Test
 - c) Avenues of Service
 - d) Mission
- 7) Rotary Club Organization
- 8) District Organization
- 9) Constitution and Bylaws
- 10) Projects and beneficiaries
- 11) Dues
- 12) Other Giving
 - a) The Rotary Foundation
 - b) Club Foundation
 - c) District Foundation
- 13) Goals
- 14) Committees
- 15) Grants
 - a) District Grants
 - b) Global Grants
 - c) The Rotary Foundation Causes
- 16) Rotary Youth Leadership Awards (RYLA)
- 17) Rotary Leadership Institute (RLI)
- 18) Rotary International
- 19) Interest groups (Fellowships)
- 20) Rotary Action Groups (RAGs)
- 21) Strategic partners
- 22) Power and Depth of Rotary
 - a) Visit another club.
- 23) Rotary Pins
- 24) Club Locator
- 25) Banners
 - a) District Conference
 - b) District Assembly
 - c) International Convention

ADDENDUM D

QUALIFICATIONS

1. The Satellite effort must obtain approval from the host club's Board of Directors. The Members of the host club should be apprised of the Satellite progress.
2. Champions of the Satellite effort must meet with a District Membership Committee liaison or Innovative Club Advocate prior to the launch of the Satellite.
3. All members of the Satellite must participate in an appropriate orientation and education program under the guidance of the host Rotary club.
4. Officers of the Satellite should communicate with the host club on a regular basis and attend a host club function.
5. The members of the Satellite will pay their Rotary International per capita dues through the host club as requested.
6. The Satellite should **consider** the dues structure set by the host club's Board of Directors for its members including an appropriate admission fee and an appropriate annual fee that allows the club to cover its financial obligations.
7. While not recommended, if a Satellite club maintains a separate bank account its finances remain the responsibility of the host club and are consolidated with the host club's tax return (Form 990).

If approved, a Satellite club will:

Abide by the Constitution and Bylaws of Rotary International.

Abide by the Rotary Club Constitution and By-laws of the host club.

Maintain a good relationship with the host club and abide by its decisions and requests.

Maintain a good relationship with the district and abide by its decisions and requests.

Provide the host club with all reports required by the Rotary Club Constitution.

Promptly apprise the host club of all membership changes and submit RI per capita dues for all members to the host club in a timely manner.

Emphasize different meeting times, sometimes a different meeting place, sometimes different cost amount and/or structure (meals or no meals or pay individually as you go).