

The Satellite Handbook -

Guide To Forming, Managing and Operating A Rotary Satellite Club



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Best practices, recommendations and ideas for Districts

INTRODUCTION

The Satellite membership initiative grew out of a need to appeal to quality individuals in the communities in District 5630 adjacent to an existing club. There are many unserved small rural communities that might be able to maintain a satellite club with an interest in Rotary. However, the distance to travel (25-35 miles) to an established Rotary club poses a deterrent to joining. District 5630 has shown a continued decrease in membership over a 5 year period that parallels the declining rural population in almost every community where clubs exist. Thus communities were targeted and partnered with a strong club that had an interest and need of forming a Satellite as a way 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 who are considering the Satellite option as well as for those clubs with existing Satellites. However, there are some qualifications set forth by the District and RI (see Addendum D). As we learn more about what contributes to the success of a Satellite and best practices for the Satellite and Host Club, we could make amendments to this Handbook.

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 attendance requirements that have traditionally been part of belonging to Rotary. Satellites address both impediments:

1. Fees can be reduced because the Satellite can opt to have no (required) meals – by far the largest required financial component for most Rotarians.
2. The meeting time, location and meeting frequency components for the Satellite will be determined by Club leadership and the members of the Satellite.

It is important to understand that this initiative is not a duplicate of or patterned after the more formal Satellite Club Program of Rotary International. 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 a very simple and straightforward concept that seems to be working for several Rotary clubs in multiple Districts in North America and beyond.

A Satellite membership initiative can provide a Rotary club with:

- A new strategy to grow;
- 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/workplace, or intellectual interest to develop their own initiatives; and
- A new approach with flexibility on meeting time, meeting place, dues and more.

The Satellite option is available for clubs that 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 in club's membership;
- Club outreach throughout the community they serve;
- Support to The Rotary Foundation (by participation in programs and donations); and
- Successful service projects (local and international).

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It is important to stress that the Satellite option is not the right answer for every club. 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” 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, and Areas of Focus, complemented by personal and professional networking.

It is important to remember that a Satellite is part of the Host Club; it is not technically 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 “quick fix” or silver bullet for growing membership.
- A Rotaract club. There are no age requirements, separate by-laws, etc. for Satellites.
- 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 RI standards, full-fledged members of the Host Club.

Why is there a need for Satellites?

- Decreasing in membership at the Clubs and District.
- Struggle in net growth of membership regardless of the size of a Rotary club.
- Certain essential individuals and groups are unable to join Rotary because of meeting logistics and required financial investment.

WHO IN YOUR COMMUNITY WOULD BENEFIT FROM A SATELLITE?

Possible target areas or populations for satellites (this is not an exhaustive list):

- Young Professionals (e.g. 25-40 years old)
- Workplace - this may include any company or organization
- Small Struggling Rotary Club (e.g. a longtime struggling Rotary Club closed and became part of a larger, vibrant Rotary Club and became that Club’s Satellite)
- Geographic proximity to an established club
- Different time of day (e.g. evening meetings which are less common in North America)
- Individuals who find the financial requirements of a traditional club challenging
- Alternative to eClub format that enables in-person fellowship
- Individuals living in a senior or retirement community

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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. Some 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.

RI'S VIEW OF SATELLITE CLUBS AND SATELLITES

Satellites may be called "clubs" if they were a part of the 2011-17 Rotary International Pilot Program.

The other reason for referring to a Satellite as a "club" is if the intent is for the Satellite to become a separate, freestanding club in the "near" future.

If formed after 2013, based on the RI Council on Legislation, this group will be referred to as a Satellite.

The standard Rotary International Club Constitutions and By-Laws will allow for the formation of a Satellite without having to make any provisions or changes.

FORMING A SATELLITE

It is extremely important that our Host Clubs and their respective Satellites start off properly in order to create a viable and sustainable Satellite.

To ensure success, the following are administrative guidelines from the District and District Membership Team (DMT):

- The DMT or District Membership Team should designate one of its members to serve as the Satellite Liaison. The Liaison will provide advice to Rotary Clubs about forming and running a Satellite.
- The Host Club needs to reach out to the DMT's Satellite Liaison. The Satellite Liaison needs to be aware of the potential formation early in the Host Club's exploration process and subsequent launch of a Satellite in order to provide support and intellectual resources. The District asks that the Satellite effort meet with the Satellite Liaison for a "Satellite Strategy Session" to ensure that the right administrative and financial considerations have been made, prior to any proposal made to a club Board of Directors and subsequently the Rotary Club.
- In the early stages of exploration of forming a Satellite, the Host Club should submit the information worksheet to the DMT's Satellite Liaison and the District Membership Team at the District website (see Addendum A for the link).

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- The Host Club makes the rules. Neither the District nor DMT will dictate any rule or regulation.(However, if you need some guidance or ideas, the DMT has those available for club use.) This is a Club initiative and not a District, Zone or RI initiative. Each Club makes its own rules about how much dues will be for members of the Satellite, as long as the fees are high enough to support District and RI dues.
- The Club also makes the rules when and where the Satellite meets. Clubs are encouraged to recognize the need for a substantial connection between the Host Club and its Satellite. Combined projects, service work and gatherings are strongly encouraged. The Host Club and its Satellite should have shared experiences to ensure a bond remains among the members.
- All Satellite members are required to pay Rotary International (RI) and District 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 their respective District's database and Rotary International's database as a member of the Host Club. There is no special designation for Satellite however, there is a designated membership affiliation in the District database (DACdb) for Satellite member notation. This will enable the membership reports to be accurate for the Host Club and for dues purposes. Clubs are encouraged to use the FREE resources provided in the District DACdb service as a useful tool for the Host Club to maintain a list of all club members.
- It is recommended that the Host Club prepare a Memorandum of Understanding to establish the policies and procedures for its Satellite.

MANAGING A SATELLITE

- The Host Club provides general oversight, support and mentoring of a Satellite as is 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 shall be the Chair and other officers may include the Immediate Past Chair, the Chair-Elect, the Secretary and the Treasurer.
- The Satellite 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. It shall have no authority within, or over, this club.
- A Satellite operates under the Constitution, By-Laws, and rules of the Host Club unless both groups 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.

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- A Satellite and its officers do not have special access to Rotary databases; only the Host Club executive can add, change or delete information. Individual members will be able to access “My Rotary” normally.
- The two groups (i.e. Host Club and Satellite) should enjoy a close working relationship with occasional joint meetings, socials and joint participation with projects as often as possible. This will be essential bonding for the long-term future and well-being of the Host Club and Satellite.
- The Host Club is encouraged to invite the Satellite to meet together at least once per quarter.
- The Board of the Host Club has the final authority where there are disagreements.
- The Host Club will be responsible for all Rotary administrative functions of the Satellite including dues collection and the handling of grant funds.
- The Host Club mentor(s) should continue to attend the new Satellite’s meeting for at least twelve (12) months. The President and Board members of the Host Club should assist and mentor their counterparts in the Satellite.
- This is a balancing act. 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.
- The relationship between the two groups is permanent and the workload for the Host Club will be increased. The District Governor must be satisfied that the Host Club can fulfill these extra duties permanently or until the Satellite charters as a separate club if it decides to do so.

RECOMMENDED BEST PRACTICES FOR SATELLITE OPERATION

- The Host Club should have at least one member, and preferably two, who serve as mentors to the Satellite and help champion the Satellite in its formation and operation.
- 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.
- Satellites should also provide additional regular opportunities for service, fellowship and Rotary engagement.
- A Satellite should be encouraged by the Host Club mentors to establish a simple management structure to help the Satellite in organizing its activities. This may be as simple as electing a chair.
- Members of the Satellite should be eligible for management positions of the Host Club. The Host Club may elect to revisit its by-laws with possible amendment to them to make it possible for a Satellite member to serve in a management position. (Note: All Club Constitution and By-laws changes must be approved by the Host Club Board of Directors and two-thirds of the club membership.)

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- 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 DMT 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.
- Dues charged by the Satellite must be set in conjunction with the Host Club.
- The Satellite shall submit an annual report to the Host Club and the DMT reporting on its membership, activities and programs.
- 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 proposal.
- There are no minimum or maximum numbers required; however, the Satellite should be capable of operating independently.
- The privileges and obligations of Rotary membership apply equally regardless of which meeting (Host Club or Satellite) they attend. The Host Club and the Satellite are permanently linked as the members of both groups ultimately comprise the Host Club. That tie can only be broken if the Satellite charters as an independent Rotary Club.

LAUNCH YOUR NEW SATELLITE

- The initial induction of Satellite members may be done at the Satellite meeting or a Host Club meeting. Generally, 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 an orientation program for all new members to ensure appropriate education about the history and function of Rotary, its foundations (RI 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.

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Rotary 101 – Orientation, Education and Guidance

Orientation suggestions can come from the Host Club as well as the DMT and its resources (including the District Trainer). See Addendum C for a brief outline of the topics that the DMT recommends educating a new Satellite Rotarian, or any new Rotarian!

Rotary Development & Leadership Training

Satellite leadership is not required to participate in any leadership training; however, the District recommends that newly formed Satellites send their chairs to at least one (1) leadership training opportunity in order to become familiar with the ideals of Rotary, the expectations of Rotary clubs in your respective District, and the lessons learned from other clubs.

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

- Rotary Leadership Institute (RLI)
- Club Training Workshop (aka District Assembly)
- District Conference
- Satellite Summit

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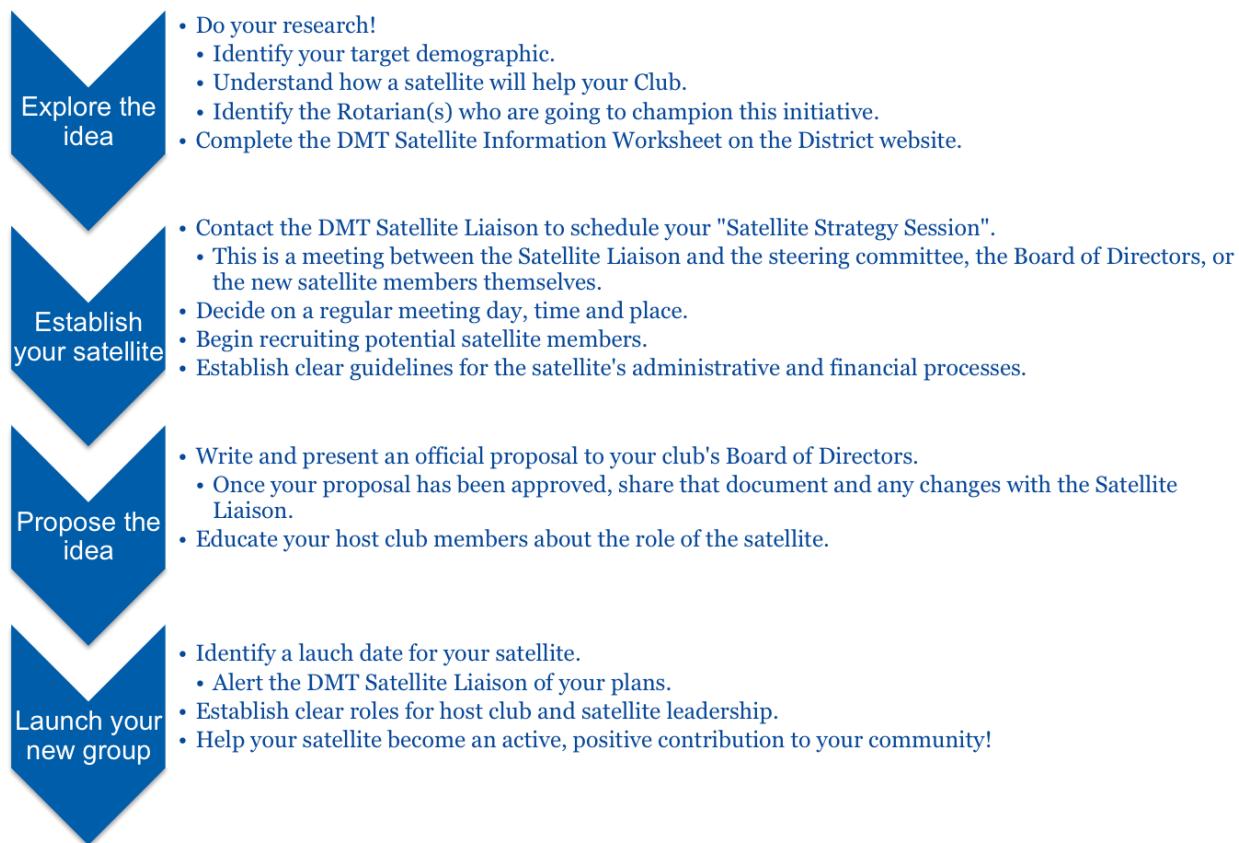
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ADDENDUM A – SATELLITE PROCESS

Your District Membership Team (DMT) should create a worksheet that should be completed by a Rotary Club exploring forming a Satellite.

The District will use this information to add Satellites to the District Directory as well as to provide training opportunities, support, and more to Satellite leadership. The DMT may ask Satellites to submit the form for updates to ensure the most up-to-date information is on file at the District level.

The Satellite planning effort of the Host Club should hold a “Satellite Strategy Session” with the DMT’s Satellite Liaison prior to submitting a proposal to their Host Club Board of Directors. This is to help the Satellite effort provide the most complete overview of their administrative, financial and service goals to the Board of Directors. It will be easier to have plans in place that can change later rather than to make it up as the Satellite tries to grow and flourish.



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ADDENDUM B – GLOSSARY OF SATELLITE TERMS

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

District Membership Team (DMT) – A team of Rotarians in your District who oversee membership growth, engagement and retention with the express purpose of being a resource for Club membership chairs, Clubs, Assistant Governors and the District Governor's leadership string.

Satellite – 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.

Satellite Liaison – A member of the District Membership Team (DMT) who is designated to focus strictly on advising and supporting potential and existing satellites.

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ADDENDUM C - ROTARY 101 ORIENTATION

1. Structure Of Rotary

- Approximately 1.2 million Rotarians in over 200 countries
 - Over 34,000 Clubs
 - 535 Districts
 - 30+ Clubs in District
 - 6 Areas in District
 - 34 Zones
 - Rotary International
- Rotaract & Interact
- No affiliation with religion, politics, etc.
- History
- District and Club Websites
- ABCs of Rotary

2. Guiding Principles

- Object of Rotary
- Four-Way Test
- Avenues of Service
- Mission

3. Rotary Organization

- Club
 - Organization
 - Constitution and Bylaws
 - Weekly meeting agenda
 - Projects and beneficiaries
 - Dues
 - Other Giving
 - The Rotary Foundation
 - PolioPlus
 - Paul Harris
 - Club Foundation

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ADDENDUM C - ROTARY 101 ORIENTATION

- District
 - Goals
 - Organization
 - Committees
 - Grants
 - District Grants
 - Global Grants
 - Areas of Focus
 - Rotary Youth Leadership Awards (RYLA)
 - Rotary Leadership Institute (RLI)
 - Vocational Training Teams
- Rotary International
 - Organization
 - Interest groups (Fellowships)
 - Action groups
 - Strategic partners

4. Depth Of Rotary

- Visit another club
 - Pin
 - Club Locator
 - Pennants
- District Conference
- District Assembly
- International Convention

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ADDENDUM D – QUALIFICATIONS

Your Satellite must meet the qualifications set forth by your respective District and RI's constitutional documents.

1. The Satellite effort must obtain approval from the Host Club's Board of Directors. It is also recommended, although not required, that the Satellite effort obtain a two-thirds favorable vote from the Host Club's existing members.
2. Champions and Mentors of the Satellite effort must meet with the DMT's Satellite Liaison 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 or Chairs of the Satellite will communicate with the Host Club on a regular basis as established by the Host Club and attend a Host Club function no less than once per quarter.
5. The members of the Satellite will be included on the Host Club's semi-annual report (SAR) and will pay their RI per capita dues through the Host Club as requested.
6. The Satellite will abide by the dues structure set by the Host Club's Board of Directors for its members including an appropriate induction fee and an optional annual fee that allows the Host Club to cover its financial obligations.

If approved, this Satellite will:

- Abide by the Constitution and Bylaws of RI.
- 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 (Host) Club Constitution.
- Promptly apprise the Host Club of all membership changes (additions and losses) and submit RI per capita dues for all members to the Host Club in a timely manner.

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FINAL THOUGHTS

- Satellites = Flexibility
 - meeting time, place, cost and structure (meals or no meals)
- Identify a Club Liaison to champion and Mentor Satellite
- Clubs initially will need 8 people to establish a chartered Satellite
- Prospects can include community leaders, Rotary alumni, children of potential members, colleagues, and friends. Retired and young professionals are a key demographic
 - Satellites are not necessarily for only young people: it can be age, work, geography-based or even something different
- Focus on Community Service, Fellowship and Professional Development
- Clubs should complete the Satellite Worksheet
- Satellite will establish a regular meeting structure, day of week and time. Two meetings per month are required. A regular meeting can be:
 - a weekly meal (Breakfast, Lunch, Dinner or after work appetizer)
 - a meeting location might be a restaurant, community facility
 - a project (focus on projects passion of Satellite members)
 - a social
- Establish Dues structure
- Challenges:
 - Find a meeting place that doesn't require a fee.
 - Time commitment