



ROTARY CLUB OF SANTA FE, NEW MEXICO

NEW MEMBER PROPOSAL PROCESS AND PROCEDURES

Process Step	Actions Required	Persons Involved	Documents Required	Document File Names	Notes
1. Candidate Identified	Recruit Sponsor if sponsor not already involved.	MDC or Sponsor	(none)	(none)	Candidacy may originate with sponsor, candidate, or third party.
2. MDC gives to sponsor New Member Proposal Packet	Sponsor must read and follow instructions	MDC and Sponsor	New Member Proposal Packet	a) cover_memo_sponsor_2.doc a) How to Prop New Mmbr.doc b) Membership Proposal Form.doc c) Attendance Reqs Smry.doc d) New Member Dues Invoice.doc e) Paul Harris Pledge Card	A specific MDC member will be assigned to track the Proposal
3. Candidate attends at least four club meetings	Candidate with sponsor must attend at least four regular or special meetings of club	Sponsor and Candidate	Visitor name badge and sign-in sheet	(N/A)	Purpose of this step is to assure that candidate understands Rotary, and meets some members
4. Orientation Session	Candidate and Sponsor attend orientation session	Candidate & Sponsor & Orienters	Orientation Materials (provided by orienter)	(none)	Membership obligations clearly described to candidate
5. Candidate completes Proposal.	Sponsor gives appropriate Proposal documents to candidate and assists in their completion	Candidate and Sponsor	a) Membership Proposal Form b) Candidate bio or CV c) Sponsor's letter of recommendation d) New Member Dues Invoice e) Paul Harris Pledge Card	a) Membership Proposal Form.doc b) (Provided by candidate) c) (Provided by sponsor) d) New Member Dues Invoice.doc e) Paul Harris Pledge Card	
6. Proposal goes to MDC	Sponsor conveys complete and legible Proposal and initial payment to Chair of MDC	Sponsor and MDC	(Same as in step 5. above), + f) initial payment	(Same as in step 5. above), + f) initial payment	The assigned MDC member verifies accuracy and legibility of documents, and obtains any needed additions or corrections



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7. Proposal reviewed by MDC	MDC reviews Proposal and either recommends acceptance to Board, and assigns classification, or rejects application and notifies sponsor	MDC	(Same as in step 5. above), + g) Record of Action on Proposal	(Same as in step 5. above), + g) New_Mmbr_Prop_MDC_Secn.doc	Great tact and diplomacy required if candidate is rejected!
8. Proposal reviewed by Board	Board either accepts or rejects recommendation of MDC	Club Board of Directors	(Same as in step 7. above), and Minutes of Board meeting	(Same as in step 7. Above, and Minutes of Board meeting)	
9a. Board Rejects	Board rejects candidate at current time; so notifies MDC	Board of Directors	(Same as in step 8. above)	(Same as in step 8. above)	
9b. MDC notifies sponsor	MDC notifies sponsor of rejection and returns initial payment	MDC Chair	Letter to sponsor	(custom letter)	Great tact and diplomacy required!
10. Board Approves	Board approves candidate for membership; so notifies MDC	Board and MDC	(Same as in step 8. above)	(Same as in step 8. above)	
11. Candidate name published	MDC Chair causes candidate's name and bio to be published in <i>La Rueda</i>	MDC Chair	Usually an e-mail to <i>La Rueda</i> editor	Language for La Rueda.doc	Publication is required by club by-laws
12a. Club member(s) object	Objector(s) must notify Board in writing	Objecting club member & Board	Custom letter	(none)	Club members have 10 days to notify Board of any objection
12b. Objection(s) reviewed	Board considers and votes upon objection(s)	Board of Directors	Objector(s)' letter	(none)	
12c. Objection sustained	Board so notifies MDC	Board & MDC	Minutes of Board meeting	(none)	
12d. Sponsor & candidate notified	MDC notifies sponsor, and sponsor notifies candidate	MDC Chair, Sponsor & Candidate	Custom letters	(none)	Great tact and diplomacy required!
13. No Objections, or objection over-ruled	Board so notifies MDC	Board & MDC	Verbal & (later) Minutes of Board meeting	(none)	
14. Sponsor notified	MDC notifies Sponsor	MDC Chair	Sponsor Notification Letter	Sponsor Notification Ltr.doc	



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15. Candidate notified	Sponsor notifies candidate of acceptance	Sponsor	Verbal and/or custom letter	(none)	
16. Candidate Inducted	Candidate is inducted into club as a new member	MDC Chair & Sponsor & Candidate	New Member Induction Pack	(See "Rotary New Member Induc'n Kit list.doc" for all documents required)	Preparation of induction pack is a considerable task
17. Papers to Secretary	MDC conveys originals of new member's Proposal papers to Club Secretary, who forwards payment(s) to Club Treasurer	MDC Chair & Club Secretary and Treasurer	a&b) Membership Proposal Form c) Candidate Bio or CV d) Sponsor's letter of recommendation e) Record of Action on Proposal f) Fees and Dues Payment(s) g) Paul Harris Pledge Card	a) New_Mmbr_Prop_Cand_Secn.doc b) New_Mmbr_Prop_Spnsr_Secn.doc c) (provided by candidate) d) (Provided by sponsor) e) New_Mmbr_Prop_MDC_Secn.doc f) Payment Voucher(s) g) Paul Harris Pledge Card	MDC may retain copies. This is the step at which new member officially enters the records of the club.
18. Blue Badge ordered	Secretary orders Blue Membership Badge for new member	Secretary	(Secretary's merchandise catalogs)	(none)	Secretary holds new badge until step 20. below
19. New Member Talk	New Member presents a five minute about himself or herself	New Member & club	(none)	(none)	Talk is preferable at induction, but may be presented later
20. Red Badge-to-Blue Badge Conversion	New Member accomplishes requirements to earn permanent blue name badge	New Member <u>and</u> Sponsor	Instructions and checklist	a) RED BADGE TO BLUE CONVER.doc <u>and</u> b) RED BADGE CONVERSION CHECK LIST.doc	MDC must monitor and promote speedy completion
21. Monitoring New Member	MDC monitors new member's progress in becoming active in club	MDC	(none)	(none)	Critical to success of new member in becoming an active, committed Rotarian