



Membership Prospect Reference & Guidelines

1) Membership Criteria

(a) Pursuant to the Club's bylaws:

- i) The Club shall strive for a diversified membership reflective of the community it serves. There shall be no limitation on membership or other impositions on Members that would result in unlawful discrimination on the basis of race, national origin, sex, sexual orientation, religion, age, disability or political party or positions.
- ii) The Club recognizes the importance of seeking out younger persons who are qualified for membership. (Members under 40 years old can be considered for YoPro status which offers reduced dues and attendance exemption)
- iii) The Club shall be composed of Members, each of whom shall be an adult person of good character and good business, professional and/or community reputation:
 - (1) engaged as a proprietor, partner, corporate officer or manager of any worthy and recognized business or profession;
 - (2) holding any important position in any worthy and recognized business or profession or any branch or agency thereof;
 - (3) having retired from any position listed in subparts (1) or (2), including any branch of the armed forces of the United States; or
 - (4) being a community leader who has demonstrated through personal involvement in community affairs a commitment to service.

(b) Other items to consider:

- i) Have sufficient capability to meet financial requirements of membership (able to afford initiation, dues, lunch) as well as recommended \$350 annual donation.
- ii) Have an interest in performing community service
- iii) Not belong to any other service organization or another Rotary club
- iv) Have control over his/her calendar
- v) Know other club members

Membership estimated costs

| | Dues for Active members | Dues for Seniors (must meet criteria for this category) and Young Professionals |
|--------------------------------|--|---|
| One Time Initiation fee | \$750.00 | Seniors - N/A Young Professionals - \$350 donation |
| Annual dues | \$475.00 (billed quarterly \$188.75) | \$295.00 (billed quarterly \$73.75) |
| Meals | \$1,584 ~ approximate (\$34 per lunch at 48 per year) Option to attend and not eat \$6 | \$1,584 ~ approximate (\$34 per lunch at 48 per year) Option to attend and not eat \$6 YoPros-min 3 lunch charge per quarter |
| Minimum Annual Donation | \$350.00 | \$350.00 |
| | | |

2) Classification overview

(a) Elected officials

- i) Pursuant to the Club's bylaws, applicants "elected or appointed to public office for a specified time" are not eligible for membership in the Club. This prohibition does not apply to judges or to individuals holding positions in schools and colleges. Also, if someone is a member of Club 33 and gets elected to an office, that person can stay in the Club under that person's old classification. Finally, elected officers can potentially come into the Club as honorary members. Honorary membership is solely within the discretion of the Board of Directors.

(b) Active duty military

- i) Often travel and frequent transfers preclude membership, however the club considers active duty on a case by case basis. Commands of major bases in SD County are offered Military Liaison status.

(c) Retired

- i) Membership criteria is applied per bylaws, "Previously engaged as proprietor, partner, corporate officer or manager of any worthy and recognized business or profession or must have held an "important position" in such a business or profession."

(d) Schools/Educators

- i) Colleges - Seeking Deans or Assistant Deans and above
 - (1) Public schools K-12 - Principals or senior administrators, etc. would be appropriate

(e) Existing members of same company or business type

- i) Common courtesy to ask active member for their support as sponsor or otherwise

(f) Non-profit organizations (501(c)3)

- i) The Club is occasionally near its 10% limitation of the NPO classification and due to this status, a detailed sub-criteria of considerations have been created over the years to help manage this category in an effort to balance the membership as a whole and not to indicate that non-profits are any less important than for-profit businesses. Therefore, the following guidelines have been established:

- (1) New applications are filed as pending until an open slot is available. When an opening arises, preference is given as follows:
 - (a) To former Rotarians
 - (b) More prominent organizations
 - (c) Organizations in the club for which we have had representation in the past
 - (d) Organizations where our members are actively involved
- (2) Additional criteria have been established to assist in prioritizing if a prospective candidate should be put on the list to go through the membership process when an opening occurs in the NPO classification. While these criteria are suggested, consideration of membership diversity should also be considered for NPOs as other classifications.
 - (a) High rating of public trust (Chronicle of Philanthropy, United Way, etc.)
 - (b) Budget size of \$1,000,000
 - (c) CEO or Executive Director
 - (d) No more than 20% of revenue based on grants or cyclic funding
 - (e) Form 990 filed with IRS which forwards to Guidestar
 - (f) Paid (vs. volunteer) staff and consideration of size of staff
 - (g) Annual audit or Certified Financial Review, using standard accounting practices, resulting in "unqualified opinion"
 - (h) Governing/policy board (vs. board involved in agency operations)
 - (i) At least several years of operations
 - (j) Broad service area (vs. very localized); national connections (vs. purely local)
 - (k) Multiple/broad funding sources with at least 70% of contributed incoming going to programs
 - (l) Significant involvement by Club 33 Rotarians
- (3) No "Additional Actives" are permitted in the affected classifications. For example, YMCA is already an active classification and no other YMCA members would be eligible.