Membership Committee
UNITED STATES COUNCIL OF SERRA INTERNATIONAL
333 West Wacker Drive, Ste. 500, Chicago, IL 60606
888-777-6681 www.serrausa

CHARTERING A NEW SERRA CLUB ADMINISTRATIVE CHECKLIST V5, 01-26-19
Start Date: _______________________

PROSPECTIVE SERRA CLUB: DIOCESE _______________________

CITY, STATE _______________________

POINT PERSON NAME: _______________________
Check one: ___DG ___ RD ___ Membership Ambassador ___ Other

DATE: _______________________

ACTION: _______________________

PERSON Responsible _______________________

1. Serra Office staff (OFFICE) receives a NEW CLUB INQUIRY or notice of INTENTION TO START a Serra Club. OFFICE creates a New Serra Club Administrative Checklist (this form) on a shared drive that can be accessed by the Region Director, District Governor, Council President and Council VP of Membership. Once created, future updates to the list should be made only by RD, DG or the OFFICE staff. OFFICE creates a unique file for this potential club that will contain contact info, relevant correspondence, charter application, and other start up documents.

2. OFFICE notifies RD, DG, US Council President and VP of Membership of NEW CLUB INQUIRY.

3. RD and DG select the POINT PERSON for the formation of this new Serra Club (usually the District Governor or a Membership Ambassador).

4. OFFICE emails electronic “New Serra Club Quick Start Manual” to the POINT PERSON.

5. POINT PERSON communicates with local contacts ASAP to discuss interest level of the local community, introduces the “New Serra Club Quick Start Manual” to prospective Serrans, and contacts the Sponsoring Serra Club president or Serra District Extension Team (DET) members (if available) to determine interest and ability to assist in New Club formation.

6. POINT PERSON meets with Bishop and Vocation Director, using the New Serra Club QUICK START MANUAL as a guide, and confirms interest in establishing a Serra Club in their diocese. Once confirmed by Ordinary, the status changes from a New Club Inquiry to Club-in-Formation. POINT PERSON then requests:
   - Ordinary approves request to Charter (expressed in written form)
   - Ordinary appoints an acting Club Chaplain
   - Ordinary sets the date for Charter event, 9-15 months in future
   - Proposed Charter Date: _______________________

QUICK START MANUAL 13 January 2019 Release Version 7
7. POINT PERSON establishes a Serra Club Formation Team consisting of interested Serrans from nearby sponsoring Serra Clubs and Serra District Extension teams

8. POINT PERSON coordinates:
   - all recruiting activities to recruit a minimum of 25 charter members,
   - guides the selection of initial club officers
   - initiates early Club-in-Formation prayer and vocations activities
   - oversees the completion of the charter application packet.

A minimum of 30 days prior to the Charter Event, items 9-13

9. A minimum of 30 days prior to charter event, POINT PERSON collects and submits initiation fees and completed charter application package to SI Executive Director

10. SI EXECUTIVE DIRECTOR coordinates the SI Board of Trustees review and approval of new club charter application and sends Club charter documents to the Point Person


12. POINT PERSON coordinates the purchase or gifting of the new club symbols (bell, gavel, banner, and statute of St. Junipero Serra)

13. POINT PERSON coordinates local charter event program and responsibilities for the many incoming Serra Club officers at the Celebration Mass and charter event

14. CHARTER EVENT IS HELD

15. DISTRICT GOVERNOR provides continuous support after the Charter Event for the first year of the club operation, coordinating visits between members of the local New Serra Club Formation Team and by officers of supporting local area Serra Clubs (if nearby) and regular mentoring communication between the President and four Vice Presidents