

Membership Committee
UNITED STATES COUNCIL OF SERRA INTERNATIONAL
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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: _____

_____ 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 _____

_____ 11. DG, RD, US COUNCIL VP MEMBERSHIP, and US COUNCIL PRESIDENT determine the key US Council leaders to attend the Charter event. _____

_____ 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 _____