What to Do When Transferring to New Club

Revised August, 2020

Rotarians transfer to new Rotary Clubs for many reasons – relocation, business changes, conflicts in meeting times or days, personal issues, among other reasons. It is our desire to keep Rotarians active and involved in a club that suits their personal schedules, community and interests.

Steps for the Transferring Member:

Here are some simple steps to follow when transferring clubs.

1. The transferring member should visit several clubs, and when satisfied that the new club meets the interests, schedule and location of the transferring member, he or she should indicate an interest in joining to the new club's membership chair, secretary or club president.
2. An alternative to joining a club that meets in person is to join an E-Club. Check out the E-Club of District 5190 at https://portal.clubrunner.ca/12669/ to find out more!
3. The new club will treat transferring members in the same way as prospective new members who have not been involved in Rotary, including such things as the completion of membership proposal forms, a board vote, the circulation of the proposed transferring member's name among the current members, an orientation meeting (often known as a "fireside chat") and finally an induction into the new club.
4. Transferring members should provide a note from the prior club that all financial obligations have been cleared. Rotary form EN-214 "Confirmation of Former Rotary Club Membership and Good Financial Standing" may be used for this purpose.
5. Transferring members should provide the new club with their Rotary Membership Number in order that membership history and Rotary Foundation giving history will follow the member. This number appears on the Rotary Foundation Individual Giving History report, and the former club's secretary can look it up on the semi-annual invoice or in Club Runner. Rotary International can also provide the number, and can be contacted at contact.center@rotary.org.
6. It is customary for the new club to waive any club member initiation fees, but otherwise dues and other financial obligations are the same as for any new club member.

Steps for the Former Club Secretary:

Remove the member from the membership roster in Club Runner.

In order for a member to successfully become transferred to a new Club, the Secretary of the former Club must first ***remove the member from the membership roster in Club Runner*** ("terminated"), indicating the reason for termination such as "business transfer", "moved", or "joined other club".

The step by step instructions are available at: https://www.clubrunnersupport.com/article/1274-how-do-i-transfer-a-member-to-my-club

Steps for the New Club Secretary:

Add the Transferred Member to Your Club's roster. When adding the member, if you have the member's first and last name, e-mail address or Rotary ID, use the 'Transfer New Member' button on the Active Membership list to proceed with pulling the member's information from Rotary into the new Club in ClubRunner. If you are unable to find the member using the 'Transfer Member' form, please continue to add the member to your Club as a New Member using the 'Add New Member' form. When filling the form, enter the member's Rotary ID, into the 'Rotary Member No.' field and this will prompt the integration service to look for this Member and their Rotary ID.

Notes for Rotary Clubs:

- Rotary International requires that the Date Joined Club must be within the last 30 days.

For Rotary Clubs with RI Integration Enabled

- When your club has the integration service enabled before the member is added to ClubRunner or Rotary we now check the details of the new member with Rotary. We search the Rotary database on the details provided in the form using their: Rotary ID, Email Address, Name & Location. Any matches will be displayed for you to choose.

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