



# District 56

Serving Southeast Texas

## District 56 New Club Chartering Document Guide

The purpose of this guide is to aid Club Sponsor(s) in preparing the necessary paperwork to charter new clubs. Completed forms and payment are needed to fully charter the club. Form submission is done via EMAIL TO: [NEWCLUBS@TOASTMASTERS.ORG](mailto:NEWCLUBS@TOASTMASTERS.ORG). **NOTE:** All Club Sponsor(s) must be assigned by the Club Growth Director.

A charter form checklist and chartering forms 1–6b have been combined into a single, fillable PDF document titled, “[Charter Forms and Checklist 082022](#)”. As an expedited option with common responses entered, we have included a “[Sample Charter Forms and Checklist 082022](#)” download that provides editable content.

**NOTE:** you must click link to download, open Acrobat Reader, and then navigate to your download file. Do NOT click directly on the download file. If you do so, you will NOT be able to edit the file.

Regardless of which method you choose to use, it is recommended to complete the chartering documents by typing them versus handwriting them to eliminate any typos and to expedite processing at Toastmasters International.

### Detail Charter Form Information and Instructions

#### Charter Forms Checklist.....PDF/page 1

This (1) one-page checklist identifies all the chartering document forms and provides instructions on where/how to send them when completed.

#### Form 1 - Application to Organize a Toastmasters Club.....PDF/page 2

This (2) two-page form is typically sent in as soon as a decision is made to start a club. If it was previously submitted to Toastmasters International, you do **NOT** have to submit it again. If you do re-submit this form for any reason, please let Toastmasters International know that it was previously submitted and call to their attention any changes made. Both completed/signed pages are required to process application. Information needed to complete the form are:

- **The Undersigned Applicant Club** – [enter city, **Texas**, zip code, **USA**, and date]
- **Permission Box** – [check usually **Yes** to find club in search engine]
- **Signed** – [must be signed by Coordinator or Club President]
- **Date** – [enter date]
- **Coordinator or President’s Name** – [enter name]
- **Organization Name (if applicable)** – [enter organization name]
- **Address 1** – [enter street address]
- **Address 2** – [enter additional address, if needed]
- **City** – [enter city, usually Houston]
- **State** – [enter **Texas**]
- **Country** – [enter **USA**]
- **Postal Code** – [enter zip code]
- **Phone** – [enter phone number]
- **Email** – [enter email address]
- **Mail Check Number** – [enter check number, if applicable]
- **Amount US \$** - [enter 125.00, if you want to send in application to organize right away; will receive charter kit]
- **Mail or Fax Credit Card** – [check one, either Visa, MasterCard, AMEX or Discover, if applicable]
- **Card Number** – [enter credit card number, if applicable]
- **Name as it appears on Credit Card** – [enter name, if applicable]

- **Signature** – [signed by Coordinator or Club President, if applicable]
- **Club Type** – [check choice which best describes your club]
- **Sponsoring Club** – [enter up to (2) two club numbers, if applicable]
- **Individual Toastmasters Sponsors** – [leave blank unless directed by Club Growth Director]
- **Individual Toastmasters Mentors** – [leave blank unless directed by Club Growth Director]
- **New Club Alignment** – [enter **56** for District, leave Division & Area blank unless directed by Club Growth Director]

## Form 2 - Charter Payments.....PDF/page 4

This (1) one-page form provides your statement for total payment. Information needed to complete the form are:

- **Submitted by** – [enter your club's name]
- **Club Number** - [enter if known]
- **Club of** – [enter city, usually Houston, **Texas, USA**]
- **District Number** - [enter **56**]
- **1. Charter Fee of US\$125** – [enter 125.00 if not previously submitted with application to organize]; \*Taxable in the state of Texas
- **2. Total Number of New Members** – [enter total number of new members; multiple that number by \$20 and enter total in far-right hand column]
- **2. Total Number of Dual, Reinstated & Transfer Members** – [enter corresponding number per line; there are no fees for these members; far-right hand column should be **0.00**]
- **3. If Applicable** – [enter **\$0.00**] \*Enter new charter and member fee taxes; click for tax calculator [here](#); for taxable items list and states, click [here](#)
- **4. Total Dollar Amount for Lines 1-2** – [enter total in far-right hand column]
- **5. Total Number of Members Paid** - [enter total number of members paid; multiple that number by \$45 and enter total in far-right hand column]
- **6. Renewals (optional)** – [enter renewal total to sync payment schedule to Toastmaster fiscal year]
- **7. Total Amount Enclosed (total lines 3,4, 5 & 6)** - [enter total in far-right hand column]
- **Signed** – [must be signed by the **Club President** and **Club Secretary**]
- **Date** – [enter date]
- **Mail Check Number** – [enter check number, if applicable]
- **Amount US \$** - [enter total due, should match line 7]
- **Credit Card** – [check one, either Visa, MasterCard, AMEX or Discover, if applicable]
- **Card Number** – [enter credit card number, if applicable]
- **Name as it appears on Credit Card** – [enter name, if applicable]
- **Signature** – [signed by cardholder, if applicable]

## Form 3 - Charter Membership Application & Payment Information.....PDF/page 6

This (3) three-page member application form should be filled out by the prospective charter member, with assistance from a Club Officer. Each of the charter member applications must be signed by both the applicant and a club officer. The original membership applications (Form 3) for each of the charter members will be retained by the club. Information needed to complete the form are:

- **Membership Application** – to be filled out by the prospective charter member with assistance from a Club Officer. Typically, the prospective member will fill out the applicant information and the club officer will assist or fill out the club information, membership type, and dues and fees sections on PDF page 6.
- **Applicant's Signature** – [must be signed by the applicant on PDF page 7]
- **Date** – [enter date]
- **Club Officer's Signature** - [must be signed by any Club Officer]
- **Date** – [enter date]
- **Payment Information** – [there is no need to fill out this section on PDF page 8; include payment information on Excel spreadsheet or call Toastmasters International at 720-439-5050, 6 a.m.–7 p.m. Mountain Time, Monday–Friday, excluding U.S. holidays, to pay over the phone]

**IMPORTANT NOTE:** There is no need to send individual membership applications to Toastmasters International. When submitting the charter forms to Toastmasters International via email, please [download this Excel spreadsheet](#) to fill in your charter member roster. By submitting the membership roster in the Excel spreadsheet, you ensure that all charter member names are spelled correctly. It also expedites the data entry at Toastmasters International.

- **Member Payments Excel Spreadsheet** – [enter the following **mandatory** fields, which are yellow highlighted columns: last name, first name, middle name, gender, address, city, state, postal code, country, home phone, work phone, cell phone and email address]
- **Member Payments Excel Spreadsheet** – [enter all other columns if they are known and/or apply, including: club ID, club name, club join date, membership begin date, paid status, officer, Toastmaster education level, fax and payment information]

#### **Form 4 - Charter Club Officer Information.....PDF/page10**

This (1) one-page form is the listing of charter club officers. Ideally you would identify all (7) seven people to serve in the club officer roles. To charter the club, you may submit a minimum of (3) three officers, held by three different individuals, filling the offices of Club President, Vice President Education, and Secretary. The remaining officer positions can then be filled after the club is chartered. Information needed to complete the form are:

- **Term of Office** – [check only one, either **Annual** OR **Semi-annual**]
  - **Annual** - If the club meets less than weekly, then the term of office must be **annual**. Elections for club officers are held the first meeting in May. Club officer list is updated and submitted online in Club Central by no later than June 30 each year.
  - **Semi-Annual** - If the club meets weekly, then the club officers may serve (6) six-month terms which run from July 1 to December 31 and January 1 to June 30. Elections for club officers are held the first meeting in May **AND** the first meeting in November each year. Club officer list is updated and submitted online through club central by no later than June 30 **AND** December 31.
- **Club Number** - [enter if known]
- **District Number** - [enter **56**]
- **President, Vice President Education, Vice President Membership, Vice President Public Relations, Secretary, Treasurer, Sergeant at Arms** – [enter corresponding name, email, member number if known]
- **Signed** – [must be signed, preferably by the Club President or Club Secretary]
- **Date** – [enter date]

#### **Form 5 - Club Information.....PDF/page11**

This (1) one-page form provides vital information about the new club. Information needed to complete the form are:

- **Club Name** - [enter club name]
- **Club Number** - [enter if known]
- **District Number** - [enter **56**]
- **Club Contact Phone Number** – [enter phone number/usually Club President's but can be any club officers]
- **Club Contact Email** – [enter email address; it can be the Club President's, another club officer or a generic email address that all club officers have access to]
- **Club Website** – [leave blank; this is usually set up after the club is formed using [FreeToastHost](#)]
- **Club Meeting Information** – [select 1 box only; either weekly, 1st & 3rd week, OR 2nd & 4th day of week]
- **Meeting Day** – [enter meeting day]
- **Meeting Place** – [enter conference or room number]
- **Facility (if applicable)** – [enter building name]
- **Address** – [enter full street address]
- **City** – [enter city, usually Houston]
- **State** – [enter **Texas**]
- **Postal Code** – [enter zip code]
- **Please check the box that best describes your club** – [check only one choice]
- **Is your club sponsored by a sponsoring organization?** – [check only one choice, yes or no]
- **If yes, please check all that apply** – [check all that apply]
- **Is your club:** – [check only one; either open to all OR only to members of specific organization or group]
- **Sponsoring Organization Information:** - [complete only if there is a sponsoring organization that may pay dues, fees and/or provide meeting location; enter organization name, organization contact, website, address, city, state, country and zip code]
- **Group Exemption Authorization** – [enter either Yes or No; it is usually answered yes]

#### **Form 6A - Club Constitution for Clubs of Toastmasters International.....PDF/page12**

This (6) six-page form only has data to be filled out on page 12. Your Club President and Club Secretary signatures are required, agreeing to bound by the terms of the club constitution. Information needed to complete the form are:

- **Certificate of Club Adoption (line 1&2)** – [enter club name, city/state, date signed]
- **Certificate of Club Adoption** – [enter date signed, Club President signature]
- **Certificate of Club Adoption** – [enter date signed, Club Secretary signature]

#### **Form 6B - Addendum of Standard Club Options.....PDF/page18**

This (2) two-page form details the Addendum of Standard Club Options. Information needed to complete the form are:

- **Club Name-** [enter club name]
- **Club Number -** [enter if known]
- **Club Location -** [enter City, **Texas**, Zip code]
- **District Number -** [enter **56**]
- **2. Membership Composition** – [enter N/A OR employees/contractors of (enter Company Name)]
- **3. Membership (Honorary) Membership** – [enter **N/A**]
- **4. New Member Fee** – [enter **\$20.00**] \*Taxable in the state of Texas
- **5. Club Dues** – [enter **\$45.00, 6 months, or before September 30 and March 31 each year**]
- **6. Reinstatement Fee -** [enter **\$0.00**]
- **7. Transfer Fee -** [enter **\$0.00**]
- **8. Inactive Member Dues -** [enter **\$0.00, N/A, N/A**]
- **9. Regular Meetings** – [enter meeting day, time of the day, address]
- **10. Executive Committee Meetings** – [enter **once a month**]
- **11. Additional Officers** – [enter **N/A, N/A**]
- **12. Terms of Office** – [enter one only, half-year (semi-annual) or full year (annual); must match Form 4]
- **13. Rules of Order** – [enter **N/A**]
- **Date** – [enter date]
- **Signed** – [must be signed by Club Secretary]

#### **Completed Forms – Next Steps**

The preferred method, once you have verified all your forms have been completed and signed, is to EMAIL [NEWCLUBS@TOASTMASTERS.ORG](mailto:NEWCLUBS@TOASTMASTERS.ORG) and attach:

- Completed charter forms PDF
- Member Payments Excel Spreadsheet

Completed forms and payment are needed to fully charter the club. If you choose to call Toastmasters International with payment information, the phone number is 720-439-5050. Be sure to ask for new clubs. Toastmasters International mailing address is 9127 South Jamaica Street, Suite 400, Englewood, CO 80112.

District 56 [Club Growth Director](#), [Club Extension Chair](#) and [Club Sponsor Chair](#) are ready and willing to assist you. Click links for their contact information.

#### **Where can I find New Clubs FAQs?**

Click on this [new clubs FAQs link](#).