

# MANAGING CLUB BUSINESS

This Managing Club Business textbook is partly extracted from RI online Learning Center course. Please visit the Rotary Learning Center for further information needed on the Rotary website: [Rotary.org](https://www.rotary.org)

Translating Committee  
Rotary Centre in Thailand  
April 2023

# Managing Club Business

## Course Description

As president, secretary, treasurer, or club committee chair, you're charged with seeing that your Rotary or Rotaract club runs effectively and efficiently. Learn about the processes for amending your bylaws, reporting members, and managing finances.

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# Your administrative responsibilities

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A club that operates smoothly is on its way to being a successful club. The president, secretary, and treasurer all have important roles in making that happen, including:

- Overseeing the management of club finances and ensuring that the club invoice is paid
- Making sure that updates to your membership list in My Rotary are made within 30 days
- Ensuring that members subscribe to a Rotary magazine
- Following the reporting requirements for your district and Rotary International
- Making changes to your club's bylaws as necessary

# Club standards

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All clubs are expected to achieve certain goals that are fundamental to Rotary's purpose, and your club's success starts with these common objectives. Select each card to learn more.



Carry out successful projects related to the five Avenues of Service



Strengthen Rotary's membership



Support The Rotary Foundation



Develop leaders beyond the club level

A functioning club needs to:

- Meet regularly (at least twice a month)
- Implement service projects that address needs locally or in other countries
- Keep its membership list current in Rotary's database by using My Rotary or a club management system
- Conduct its operations in ways that are consistent with the RI Constitution and Bylaws and the Rotary Code of Policies
- Maintain an environment that is free of harassment and promptly address any allegations of harassment according to the Rotary Code of Policies

- Pay per capita dues to RI, and pay RI membership and district dues without outside assistance
- Subscribe to Rotary magazine or a licensed regional magazine
- Welcome visits by the assistant governor, governor, or any officer of Rotary International
- Resolve club disputes amicably and maintain cooperative relations with the district
- Have liability insurance that is appropriate for the region
- Comply with requests from the RI Board to terminate a member who admits to, is convicted of, or is otherwise found to have engaged in harassment as defined by the Code of Policies
- Avoid initiating or maintaining litigation against Rotary International, The Rotary Foundation, associate foundations, Rotary's international offices, or the district
- Address any election complaints using the process established in the RI Bylaws section 13.030.

Let your assistant governor know if your club isn't meeting some or all of these standards. They can give you the resources and support you need to be successful.

# Understanding how your club operates

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Each club operates differently, so it's important to understand how yours works while also adhering to Rotary International's policies.

Your club policies provide guidance and stability as well as a structure for managing change. They can be adapted to fit your club's evolving needs, within the framework of RI's own policies.

These documents are the foundation for RI's policies and procedures:

- Constitution of Rotary International
- Bylaws of Rotary International
- Standard Rotary Club Constitution
- Standard Rotaract Club Constitution

The standard club constitutions include the fundamental rules for all clubs. They're updated every three years to include changes enacted by the Council on Legislation.

Your club's bylaws provide additional guidelines for managing your club. Start with the Recommended Rotary Club Bylaws or the Recommended Rotaract Club Bylaws, which reflect current Rotary policy. Use them as a template and adapt them to reflect your club's practices.

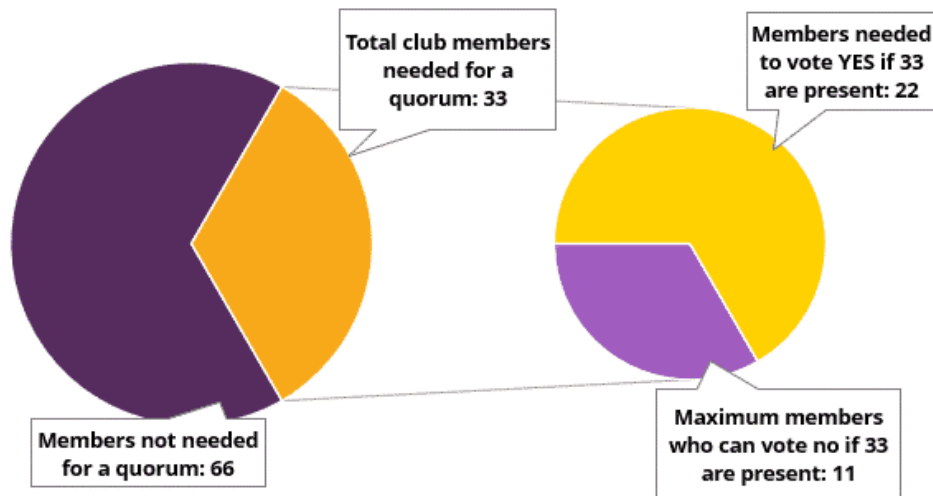
## Amending your club's bylaws

Club members need to vote on any proposed amendments to the bylaws. Be sure to notify members about the proposed amendment at least 21 days before a regular meeting, and then be sure that at least one-third of the active members (a quorum) are present to vote. In order to pass, the amendment needs to be approved by two-thirds of the members present.

Any amendments need to conform to the Standard Rotary Club Constitution and the Rotary International Constitution and Bylaws. Clubs within Rotary International in Great Britain and Ireland should refer to the RIBI Constitutional Documents.



## Example of a quorum, in a 99-member club, needed to amend the club's bylaws



- ① Each club is responsible for adopting Rotary policies, as well as any changes to them. Rotary's governance documents are updated regularly to reflect policy changes. You can find the most recent version of the Standard Rotary Club Constitution and other documents on the Policies and Procedures page of My Rotary.

## Club and board decisions

Certain decisions are made by a club's members, while others are voted on by the club's board. Test your knowledge about who decides what by sorting each card into the correct location.

	A) Club members	B) Club board
1) Accepting a new member		
2) Suspending or terminating a member		
3) Terminating the club's membership in Rotary		
4) Investigating a harassment claim		
5) Merging with another club		
6) Changing club bylaws		
7) Incorporating your club		
8) Filling vacant officer roles		
9) Electing officers		
10) Changing a club name or location		
11) Mediating a dispute		

### Answers

1-B, 2-B, 3-A, 4-B, 5-A, 6-A,  
7-A, 8-B, 9-A, 10-A, 11-B



How much notice do you need to give members before voting on an amendment to club bylaws?

- A) 10 days
- B) 21 days
- C) It depends on the amendment.

**Answers:** B) 21 days

Notice of the proposed amendment shall be given to each member and the governor at least 21 days before the meeting. Consult the latest Standard Rotary Club Constitution (found on the Governance documents page of My Rotary) and your club's bylaws (if they were amended) before voting on an amendment.

Refer to your club's constitution and bylaws every time you vote on an amendment or elect officers.

# Reporting requirements

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It's important to keep your club, member, and officer information current in Rotary's database so you receive accurate club invoices, have access to reports and resources, and are accessible to other clubs through My Rotary. It also means that you'll receive relevant communications from RI. Every club needs to submit information on:

- New and terminated members, within 30 days (but no later than 1 July or 1 January, in order to receive a correct invoice)
- New officers for the next Rotary year, by 1 February
- The use of Rotary Foundation funds, if your club has been awarded a grant (In RIBI, district grants are reported through the district foundation grants and stewardship teams.)

See the Planning Calendar in this course for more details and important dates.

Make sure your club has a procedure for reporting changes to club member data, as well as officers and their contact information (including email addresses), to Rotary International.



## Reporting through My Rotary

To use My Rotary to report members, officers, or club data, all you need is a My Rotary account. The club president, secretary, treasurer, Foundation chair, membership chair, and executive secretary/director can make these changes. These guides can help.

### How to add a club member

Instructions for adding new members ([document/how\\_to\\_add\\_member\\_en.pdf](#))

### How to manage club members

Instructions for editing and removing members  
([document/how\\_to\\_manage\\_club\\_members\\_en.pdf](#))

### **How to manage club officers**

Instructions for adding, editing, and removing club officers  
(document/how\_to\_manage\_club\_officers\_en.pdf)

### **How to update club details**

Instructions for adding or editing your club information that appears on My Rotary, such as contact information, location, meeting times, and websites  
(document/how\_to\_update\_club\_details\_en.pdf)

## **Reporting through your club management system**

If you use a club management system, report your officers and changes to member information in that system, and make sure Rotary International receives the updates. These resources can help.

### **Club management vendor list**

Find approved club management vendors and learn about the process of choosing one for your club or district.

<https://my-cms.rotary.org/en/manage/community-marketplace/club-management-systems-website-vendors?embed=true>

### **How to choose or change a club management vendor**

Find help selecting or changing a vendor and linking that vendor to Rotary International's database.

<https://my-cms.rotary.org/en/document/how-choose-or-change-club-management-vendor>

### **Data integration guide**

Use this guide to make sure your club management system is linking your club data directly to Rotary International's database.

<https://my-cms.rotary.org/en/document/data-integration-guide>

- ① **Make sure that your primary or preferred vendor can transmit data to Rotary International. The list of official participating vendors specifies the type of information you might need to update and whether the vendor can submit that information to Rotary International. Note that read-only vendors can only get data from My Rotary.**

Please write to [data@rotary.org](mailto:data@rotary.org) if you have questions about setting up a club management vendor or integrating data with My Rotary.

# Financial management

Your fiscal responsibilities include monitoring the club's funds, ensuring that dues and fees are paid, and maintaining good stewardship.

## Dues and fees

Be sure to establish or review a system for collecting payments from members and paying dues and fees to Rotary International and your district. Select each tab to learn more.



### Club Dues


Club dues usually cover the club's operating expenses. Review your club's expenses to determine how much to charge. Remember that added costs for traditional meetings, such as venue rental, meals, and speaker gifts, could exclude some prospective members. Collect the dues according to a set schedule that your club determines and records in its bylaws.

### District Dues

Many districts maintain funds to pay for district-sponsored projects and district administration, which each club contributes to through per capita dues. The amount is approved each year (if it changes) at the presidents-elect training seminar, district training assembly, or district conference.



### Rotary International Dues

<b>Rotary</b> 		<b>CLUB INVOICE — JULY 2021</b>	
Rotary Club of		INVOICE NUMBER	INV-0000470665
New Zealand		CLUB NUMBER	C000
		ROTARY CLUB OF	
		DISTRICT	
		INVOICE DATE	01-07-2021
		<b>PAYMENT DUE UPON RECEIPT</b>	
		<b>611.99 USD</b>	
<b>JUL-DEC CHARGES</b>		<b>UNIT PRICE (USD)</b>	<b>TOTAL (USD)</b>
QUANTITY	UNIT OF MEASURE		
17	Members	35.00	595.00
17	Members	1.00	17.00
DESCRIPTION			
RI Per Capita Dues			
Council on Legislation			
			612.00
<b>TOTAL JUL-DEC CHARGES</b>			
			612.00
<b>PREVIOUS BALANCE</b>			
			-.01
<b>TOTAL CLUB BALANCE (USD)</b>			
			611.99
<b>PAYMENT DUE UPON RECEIPT</b>			
			611.99 USD
<b>NOTIFICATIONS</b>		<b>QUESTIONS?</b>	

Twice a year, **Rotary clubs** are charged per capita dues by Rotary International. They are:

In 2022-23: \$35.50

In 2023-24: \$37.50

In 2024-25: \$39.25

In 2025-26: \$41.00

Any further dues increases would need to be approved by the Council on Legislation.

All dues are payable on 1 July and 1 January. For each new member admitted during a billing cycle, the club pays prorated dues to Rotary International: one-sixth of the amounts listed above for each full month of membership.

**Rotaract clubs** will be billed annually in January. Annual Rotaract per capita dues are:

\$5.00 for university-based clubs

\$8.00 for community-based clubs

These dues cover Rotary International's general operating expenses and give you access to services and resources, including courses in multiple languages; club, district, and project support; training, guidance, and resources for club leaders; and the tools, reports, and resources in My Rotary.

### Rotary Dues

Besides dues, Rotary International charges **Rotary clubs** for:

- *Rotary* magazine (if they don't subscribe to a regional magazine)\*
- Council on Legislation fees (on the July invoice)
- Service taxes and liability insurance, depending on your location

Two Rotary members who live at the same address can subscribe jointly to *Rotary* magazine or their regional magazine.

JUL-DEC CHARGES		DESCRIPTION	UNITPRICE(USD)	TOTAL (USD)
55	Members	RI Per Capita Dues	35.00	1,925.00
55	Members	Council on Legislation	1.00	55.00
56	Subscriptions	Rotary magazine - Paper	6.00	330.00
55	Members	US Club Program - Directors & Officers insurance	.99	54.45
55	Members	US Club Program - General Liability insurance	3.54	194.70
TOTAL JUL-DEC CHARGES				2,565.15
PREVIOUS BALANCE				.00
TOTAL CLUB BALANCE (USD)				2,565.15
PAYMENT DUE UPON RECEIPT				2,565.15 USD

**Rotaract fees** are collected annually each January and include subscription to the *Rotary* magazine, any regional taxes, or insurance.

## Club invoices and magazine subscriptions

Club officials also handle club invoices and magazine subscriptions. Select the plus signs below to learn more about how to manage them.

### Club invoices

Rotary emails an invoice that's based on your **Rotary club's membership** list to the club president, secretary, treasurer, and executive secretary/director in July and in January.

Rotary emails an invoice that's based on your **Rotaract club's membership** list to the club president, secretary, treasurer, and executive secretary/director in January.

The club secretary keeps the membership list updated by adding and removing members' names within 30 days of any changes. Remember that the 1 July membership figures reflect membership activity from the previous year, so anyone who joins *on* 1 July or after will be counted toward growth in the year that is just starting.

Be sure a current club membership list is reported to Rotary International within 30 days or by 1 January and 1 July, whichever is soonest, so you receive an accurate invoice. If you're using a club management system, remember to check the list on My Rotary to make sure it's accurate.



If you have difficulty making club or membership updates using My Rotary or your club management system, contact [data@rotary.org](mailto:data@rotary.org), your local Rotary office, or your fiscal agent. Rotary can make updates for clubs if you send the Member Data Form to Data Services staff:

- Email: [data@rotary.org](mailto:data@rotary.org)
- Fax: +1-847-556-2207

The president, secretary, treasurer, and executive secretary/director, as well as the membership, public image, Rotary Foundation, and service projects chairs, can pay the invoice by credit card on My Rotary's Club Administration page.

Paying dues affirms your club's membership and good financial standing in Rotary International, gives you access to Rotary resources, and is a condition of eligibility for the Rotary Citation. See the Club Invoice FAQ and the How to Pay Your Invoice guide for more information.

### **Magazine subscriptions**

Reading a licensed Rotary magazine is an easy and engaging way to stay informed about Rotary. In each issue, you'll find a blend of local Rotary news and international stories. By learning about successful club projects from around the world, you can get new ideas for your own club.

This is why it's important to comply with the requirements set by the RI Board of Directors to subscribe to and promptly pay for *Rotary* magazine or a regional Rotary magazine.

Rotary charges only for *Rotary* magazine on the club invoice. Regional magazine subscriptions are managed by the regional editors, and are sometimes included in district dues.

Contact [data@rotary.org](mailto:data@rotary.org) to manage members' subscriptions to Rotary magazine or contact your magazine editor for regional magazines. Members can also update their subscription preference for Rotary magazine on My Rotary.

- ① Clubs that don't comply with the magazine subscription requirement are notified and given 90 days to subscribe or pay. Clubs that don't comply within 90 days cannot:
- Submit suggestions to the nominating committee for governor or participate in challenging a candidate for governor
  - Vote at the district conference, district assembly, or in any authorized club ballot
  - Concur with any proposed legislation submitted to the Council on Legislation or resolutions submitted to the Council on Resolutions
  - Receive from the governor the monthly letter, district mail, or an official visit
  - Receive Rotary services, including from The Rotary Foundation, such as the acceptance of new or the processing of current program applications, or recognition as a sponsor or host of active Rotary Foundation program awards

In addition, members of the club won't be eligible to serve in any elected or appointed district, zone, or RI roles.

### **Termination and reinstatement**

Any club that doesn't pay its dues and fees to Rotary or Rotary regional magazines can be terminated. The club can also be suspended or terminated if any member misuses funds from The Rotary Foundation.

## Club termination



Four months after 1 January or 1 July, clubs with unpaid per capita Rotary dues will be terminated. Clubs that haven't fulfilled their entire financial responsibility within 150 days of termination will lose their original charter and won't be eligible for reinstatement.

Clubs that don't subscribe to or pay for a Rotary magazine may be terminated after 180 days of noncompliance.

## Reinstatement

Any terminated club that wants to be reinstated needs to pay all its financial obligations to Rotary, including a reinstatement fee of \$30 per member, within 150 days of termination. It also needs to provide a current list of members to ensure that accurate data is recorded at the time of reinstatement.



## Member termination



The club secretary should contact any club member who doesn't pay dues within 30 days of when they're due, telling them in writing how much they owe and that they need to pay within 10 days. If the dues aren't paid within that period, membership may be terminated. The board may reinstate membership if the member requests it and pays all of their club debts.

The process for terminating members for nonpayment of dues is outlined in the Standard Rotary Club Constitution, Article 13, Section 3.

## What would you do?

In the past year, you've noticed that several members have consistently been late in paying their dues. What do you think the board should do? Select each card to explore the options.

### Terminate the members for nonpayment

This is permitted under Rotary policy, but you may want to consider how many members you'd lose, why they're paying late, and what you could do to help them.

### Find out why they're paying late

Knowing why members are paying late can help you consider various options to help them stay current. These can be added to your bylaws.

### Examine your dues structure

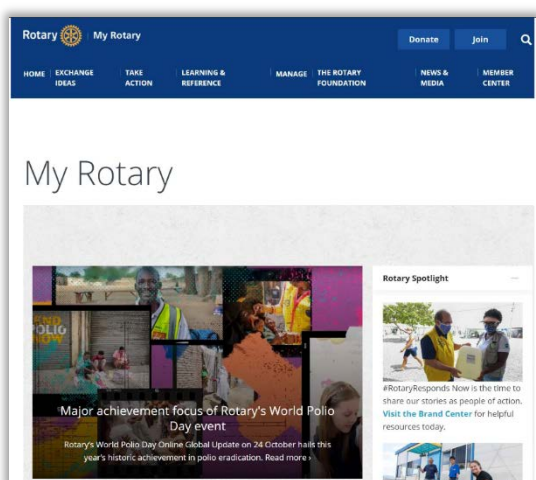
Do your club dues vary based on membership type, such as family, corporate, and junior memberships? This can make your club more accessible.



# Online resources

You have many online resources available to help you fulfill your responsibilities and conduct club business efficiently.

- ① The club administration functions, delegation, and Rotary Club Central are currently available for Rotary club officers. Rotaract club officers will have access soon.



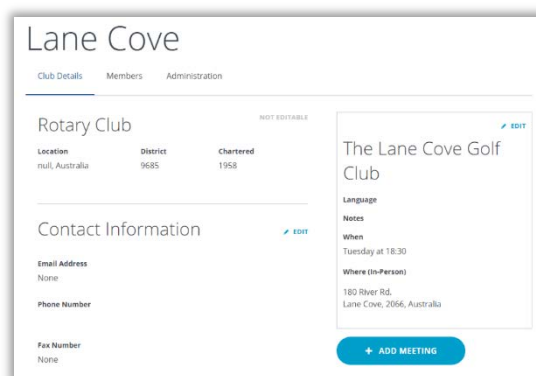
## A My Rotary account

My Rotary provides customized access to many functions and types of information. You can:

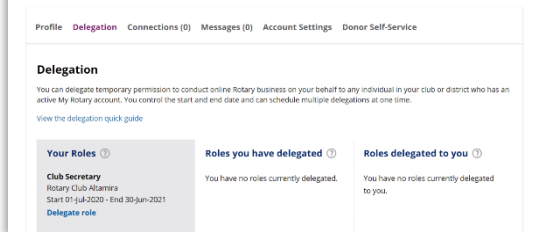
- Review reports on membership, club trends, club giving, and alumni program participation
- Browse Rotary Showcase to find project ideas and search for project partners
- Use the Brand Center to find logos and create club and event brochures
- Contribute to The Rotary Foundation
- Take more courses in the Learning Center

## Club administration functions

On the Club Administration page in My Rotary, you can update club details, members, and officers, and select or change your club management system if you use one.



## Delegation



## Delegating administrative tasks

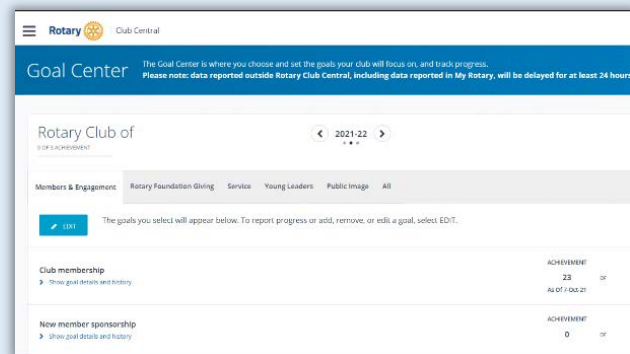
As a club officer, you can give someone else temporary permission to conduct online Rotary business on your behalf. This is called delegation. The person you delegate to needs to be at the same organizational level and needs an active My Rotary account. Your delegates can't view your personal information, such as your profile, contribution history, or discussion group activity. They can,

however, access the same tools and sensitive information that you can as a president, treasurer, secretary, and executive secretary/director. Consult [How to Delegate Your Online Access](#) for more information.

## Rotary Club Central

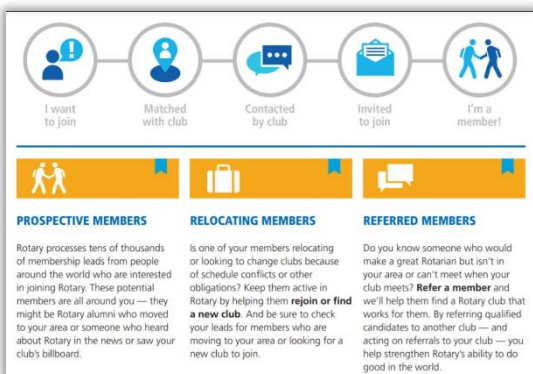
Set and track your goals for the year in Rotary Club Central.

You can enter and update goals for membership, Rotary Foundation giving, service, young leaders, and public image, which district leaders can view and edit. Officers have access during their term and the year before and year after.



All members can view their club's goals. Service projects can be imported from the Grant Center and Rotary Showcase.

Monitor your club's progress toward the goals and use the report functions. Evaluating trends can help incoming officers know how to focus their efforts for the coming year.



## Membership leads

This is where you can view and manage leads that your district has assigned to your club. The president, secretary, membership committee chair, and executive secretary/director get an alert to review the lead and take the next steps.

## Awards and recognition

The Awards page of My Rotary has information about various recognition opportunities for clubs, members, and nonmembers. If you have questions, write to [riawards@rotary.org](mailto:riawards@rotary.org).

## Awards

Members of the Rotary community help make clubs stronger, communities better, and peace possible. Thank them for their dedication and valuable contributions by recognizing them with one of these Rotary International or non-contribution-based Rotary Foundation awards.

- [Recognize a club](#)
- [Recognize individuals](#)
- [Recognize non-Rotarians](#)

### Recognize a club

#### Rotary citation for Rotary clubs

The most important award for Rotary clubs.

**Who can nominate:** club officers

**Nomination deadline:** 30 June

**Award type:** electronic certificate

#### Resources:

- [2020-21 Citation Goals and Instructions for Rotary Clubs \(PDF\)](#)
- [Learn more about the Rotary Citations](#)

The screenshot shows the 'My Rotary' website header with navigation links: HOME, EXCHANGE IDEAS, TAKE ACTION, LEARNING & REFERENCE, MANAGE, and THE ROTARY FOUNDATION. The main heading is 'Newsletters'. Below it, a paragraph explains that newsletters help users stay current on topics of interest and that anyone can subscribe after creating an account and signing in. A 'MANAGE SUBSCRIPTIONS' button is visible. A list of newsletters follows, each with a brief description: 'End Polio Now' (update on polio eradication), 'Giving & Grants' (information on supporting Rotary's work), 'Membership Minute' (Rotary stories and membership development), 'Peace in Action' (forum for the Rotary Peace Centers community), 'Rotary Convention' (news, updates, and deadline information), 'Rotary Leader' (practical information for club and district leaders), 'Rotary Service' (information to help members plan effective service projects), and 'Rotary Weekly' (update on news and information for members).

## Newsletters

Subscribe to topic-based newsletters to stay current on various Rotary subjects that are interesting or relevant to you and your club.

## Give

Refer people to the Donate page for an easy and secure way to give to the Foundation.

## Donate

The screenshot shows the 'Donate' page with a header 'Choose what you would like to support'. Below this are four tabs: 'Featured Causes', 'Areas of Focus', 'Endowment', and 'Global Grants'. A note states: 'Contributions to these featured causes are eligible for Paul Harris Fellow recognition.' There are four cards displayed: 'Annual Fund' (with a blue background and a 'Learn more' link), 'Polio Fund' (with a 'Learn more' link), 'World Fund' (with a 'Learn more' link), and 'Disaster Response Fund' (with a 'Learn more' link'). A small note at the top right says 'All fields are required unless marked optional.'

## Rotary staff members



Contact Rotary staff members with your questions about club policies, Rotary resources, or other topics.

- Club and District Support can help with policies and procedures; diversity, equity, and inclusion; adult harassment; and operational processes, such as new clubs, name changes, and club mergers.
- The Rotary Support Center can answer questions about general Rotary topics, The Rotary Foundation, donations, recognition points, Paul Harris Fellows, and Rotary staff teams.

Encourage members to register for a My Rotary account, which will allow them to:

- Create and manage a profile with their contact information, background, occupation, Rotary program participation, and areas of expertise
- View goals and achievements in Rotary Club Central
- Find and connect with other clubs and members
- Browse projects in Rotary Showcase
- Review their personal contribution history
- Take courses in the Learning Center

# What's next

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You're ready to help run your club! Consider these questions as you prepare for your presidents-elect training seminar and district training assembly:

- What are your personal goals for managing your club?
- What is one area of your club operations that you'd like to improve?
- What opportunities do you have to make your club operate more efficiently?
- How will you evaluate the success of your club's operations?