

CHAPTER 4

RUNNING YOUR CLUB



As president, you're charged with seeing that your club runs efficiently and effectively. My Rotary has resources to help you manage your club. Assistant governors and your [Club and District Support representatives](#) can also answer questions throughout the year.

AS PRESIDENT-ELECT	AS PRESIDENT
Learn about club policies and procedures by reviewing the Standard Rotary Club Constitution and Recommended Rotary Club Bylaws	Oversee the management of club finances and make sure your club invoice is paid
Work with club leaders to update your club's constitution and bylaws	Encourage members to attend district training meetings
	Minimize risk associated with club activities
	Make certain the Rotary logos are used properly

ROTARY CLUB STANDARDS

The Rotary International Board of Directors has adopted these minimum standards for an effective club:

- Pays per capita dues to RI
- Meets regularly as per RI constitutional documents
- Ensures its members subscribe to a Rotary World Magazine Press publication
- Implements service projects that address the needs of the local community and communities in other countries

- Accepts the visit of the assistant governor, governor, or any officer of Rotary International
- Maintains liability insurance appropriate for the region (United States and U.S. territories only)
- Acts in a manner consistent with the RI Constitution and Bylaws and the Rotary Code of Policies
- Pays RI membership and district dues without outside assistance
- Keeps membership list current in Rotary's database by using My Rotary or one of the club management system vendors
- Resolves club disputes amicably
- Maintains cooperative relations with the district
- Cooperates with RI by not initiating or maintaining litigation against Rotary International or The Rotary Foundation, including their directors, trustees, officers, and employees
- Follows and completes the election review process established in the RI Bylaws

These standards are only the beginning of what makes a successful Rotary club. Use the best practices in [Be a Vibrant Club: Your Club Leadership Plan](#) and ideas in the [Rotary Club Health Check](#) to ensure your club is healthy and vibrant.

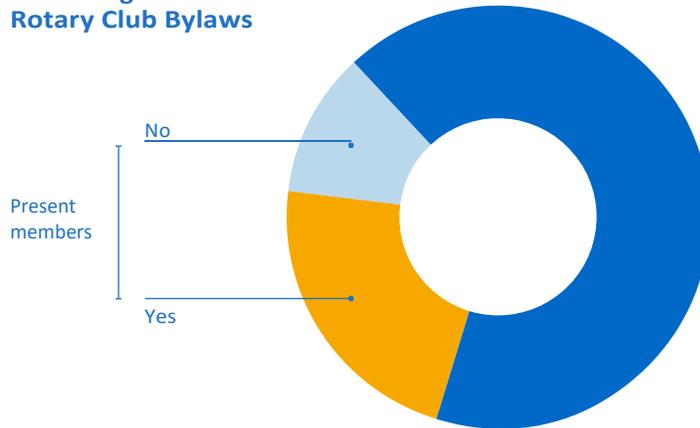
CLUB CONSTITUTION AND BYLAWS

The Standard Rotary Club Constitution provides the basic rules for all Rotary clubs. It is updated every three years to include changes enacted by the Council on Legislation. Your club's bylaws provide additional guidelines for managing your club. Use the [Recommended Rotary Club Bylaws](#), which reflect current Rotary policy, as a template, adapting them to reflect your club's culture. Review your club bylaws regularly and update them as needed.

Your club members must vote on any proposed amendments to the bylaws. Be sure to notify members about the proposed amendment at least 10 days before a regular meeting, then be sure at least one-third of active members (a quorum) are present to vote. In order to pass, the amendment needs the votes of two-thirds of the members present.

Amendments must 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](#).

Amending the Recommended Rotary Club Bylaws



Quorum: 1/3 of members
Pass: \geq 2/3 of quorum

Example:
63 Members in a club
21 Members are present
14 or more members
need to vote yes to
amend the bylaws

ROTARY'S ONLINE TOOLS

By creating an account on [My Rotary](#), you gain access to the latest reports, information, and tools. Your account helps you do Rotary business quickly and efficiently and ensures that Rotary has accurate records for your club. It also allows you to:

- Customize and share your profile to easily network with your fellow Rotarians
- Join or start a [discussion group](#) to share best practices and hear innovative ideas
- Find [volunteers, partners, and donations](#) for your projects to increase your club's impact
- Take [online courses](#) to help you prepare for your year as club president

The [Manage](#) tab on My Rotary reveals the tools and links you'll need to effectively manage your club. Use these features and resources to make your year a success.

While staying informed, you can carry out a variety of administrative tasks on My Rotary, such as:

- Update personal information
- View and edit [Rotary Club Central goals and reports](#)
- Manage your membership leads
- Update club data
- Update membership data (add, edit, or remove members)
- Access reports including:
 - Club members
 - Daily club balance
 - Contribution and recognition
 - SHARE and polio
- Manage newsletter subscriptions
- Search the [Official Directory](#)

You, the club secretary, executive secretary/director, club treasurer, Foundation chair, and membership chair can activate access rights for other officers, so be sure that club officers are reported by 1 February for the following year. Add new officers by using the link on the Club Administration page of My Rotary or by entering them into your club management system.

DELEGATION

As a club leader, you can delegate your administrative tasks on My Rotary to another team member. This temporary permission, known as *delegation*, is not intended to relieve you of your duties as president; it simply extends your president-level access to My Rotary to another club leader with a My Rotary account. Your delegate can't view your personal information, such as your profile, contribution history, or discussion group activity. This person can, however, access the same tools and sensitive information that you can as a president. See [How to Delegate Your Online Access](#) for more information.

REPORTING REQUIREMENTS

It is essential to keep your club information in Rotary's database up-to-date. Make sure your club has a procedure for reporting officers and their contact information (including email addresses) to Rotary International, as well as changes to club member data. If your club uses a [club management system](#), report your officers and changes to member information in that system, and work with your secretary or club administrator to make sure Rotary International receives the updates.

Every club is required to submit the following to Rotary International:

- Changes to club member data by 1 July and 1 January in order to receive a correct club invoice
- New and terminated members within 30 days, but no later than 1 July or 1 January
- New officers for the next Rotary year and new club meeting information by 1 February
- Information for the Official Directory by 1 February
- 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.)
- Club goals, including your membership goal, by 1 June (using [Rotary Club Central](#))

FINANCIAL MANAGEMENT

Your fiscal responsibilities include monitoring club funds, practicing good stewardship, and making sure that the club complies with all applicable local laws, including those concerning taxes and nonprofits.

DUES AND FEES

Work with your club officers to review or establish a system for collecting payments from members and paying dues and fees to Rotary International and your district.

Club dues. Club dues should be collected from members weekly, monthly, or quarterly, as determined by your club, with the dues amount set each year. These dues, which vary by club, generally fund operating expenses such as meetings, meals, speaker gifts, and supplies and should be based on your annual budget.

District dues. Many districts maintain funds for financing district-sponsored projects and supporting district administration, with each club contributing through per capita dues. The amount is approved each year at the presidents-elect training seminar, district training assembly, or district conference.

Rotary International dues. Twice a year, clubs are charged per capita dues by Rotary International as follows:

2018-19: \$32.00
2019-20: \$34.00*

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

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

Rotary fees. Besides dues, Rotary members are charged for required magazine subscriptions, Council on Legislation fees, and other expenses. Two Rotarians residing at the same address may subscribe jointly to *The Rotarian* or their regional magazine.

CLUB INVOICE

Rotary sends an invoice to the club secretary via email in July and in January, based on your club's membership list on 1 July and 1 January.

Your secretary is responsible for keeping the list updated by adding and removing members' names within 30 days of any changes. Be sure a current club membership list is reported to Rotary International so you receive an accurate

**Dues will remain constant after 2019-20 unless changed by the Council on Legislation.*

invoice. The following club leaders can pay the invoice by credit card on My Rotary's [Club Administration page](#):

- President
- Club secretary
- Executive secretary/director
- Club treasurer
- Membership chair
- Rotary Foundation chair

Your club's invoice includes Rotary per capita dues and subscriptions to the Rotary magazine for your region. Your July invoice also includes Council on Legislation fees. Liability insurance fees are included in the July invoice for the United States and its territories.

Paying dues guarantees your club's membership and good financial standing in Rotary International as well as access to Rotary resources. See the [Club Invoice FAQ](#) for more information on how to pay.

TERMINATION AND REINSTATEMENT

Any club that doesn't pay its dues and fees to Rotary will be terminated. The club can also be suspended or terminated if any of its members has misused funds from The Rotary Foundation.

Termination. Four months after the 1 January or 1 July invoice date, clubs with unpaid per capita Rotary dues will be terminated. Clubs that have not fulfilled their entire financial responsibility within 150 days of termination will lose their original charter and will not be eligible for reinstatement.

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

Member termination. Your club secretary should contact any club member who fails to pay dues within 30 days after the deadline, communicating an absolute deadline and the amount owed in writing. If the dues aren't paid within 10 days of the notification date, membership may be terminated, if the board agrees. The board may reinstate membership if the terminated member petitions and pays all his or her club debts.

TAXES

Check with local and national tax codes to determine which forms your club must file, if any. Consult your district finance committee and assistant governor for more information.

All clubs in the United States are required by law to submit an informational return to the Internal Revenue Service every year. Contact the IRS for more information.

The Club Treasurer Basics course in the [Learning Center](#) has more information about club foundations. Learn more about planning a fundraiser in the Club Service Projects Committee Basics course.

FUNDRAISING

Make an impact during your year as president with projects and activities that meet the needs of your community. An effective fundraising plan is key to supporting your projects and Rotary’s global humanitarian efforts.

Make sure your members follow these financial best practices to promote transparency and good stewardship of funds:

- Report raised funds in accordance with local laws.
- Require the chair of an event to sign for charitable expenses.
- Specify which causes the event proceeds will support in your promotions.
- Issue receipts to donors if your fundraiser qualifies as a tax-deductible event.
- Establish a procedure for sending contributions to The Rotary Foundation.
- Submit contributions to The Rotary Foundation separately from payments to Rotary International.

Club foundations. If your club has or plans to set up a foundation or charitable trust, be sure it follows local laws. Consult with your local tax authority about reporting requirements, and contact your [Club and District Support representative](#) for more information.

Voluntary contributions from Rotarians and friends of Rotary make Rotary Foundation grants possible. Find more information in [The Rotary Foundation Reference Guide](#).

RISK MANAGEMENT

Whether you are holding meetings, running fundraisers, or working with youth, risk management responsibilities are part of your role. In this context, risk management refers to a proactive process that aims to identify causes of possible loss and determine how to lessen the financial impact of a possible loss. Managing risks involves:

- Reviewing activities from the perspective of “What can go wrong?”
- Modifying activities to lessen the risk
- Using contracts and agreements to clearly define roles and responsibilities of all parties involved (consult local legal counsel to draft and review legal documents)
- Following established policies, procedures, and guidelines

Being proactive can help reduce the effects of losses. In your role, you are in a position to set the tone for your club. Being aware of and managing risk will help protect Rotarians, program participants, and club assets.

Clubs are urged to obtain professional legal and insurance advice about liability protection. For example, seek professional advice about incorporating the club (or its activities) or purchasing appropriate liability insurance coverage. Clubs in the United States and its territories and possessions are automatically covered by general liability and directors and officers/employment practices liability

insurance through a program arranged by Rotary and paid for by U.S. Rotarians. Clubs outside the United States should consider purchasing insurance if they do not already have it. See article 72.050. of the [Rotary Code of Policies](#) for additional information.

WORKING WITH YOUR DISTRICT

Your district leaders — governor, assistant governors, committees, trainer, secretary, and past governors — want your club to succeed. The district supports your club in many ways, including:

- Providing guidance on issues such as membership and projects
- Connecting clubs with similar issues or projects
- Offering leadership and service opportunities
- Communicating policy updates
- Coordinating Rotary programs such as district grants, global grants, Rotary Youth Leadership Awards (RYLA), Rotary Youth Exchange, and Rotary Peace Fellowships

Your assistant governor is your district point person, available to support your club throughout the year. Because assistant governors interact with a variety of clubs, they can observe a wide range of approaches to common issues and share insights that can help you meet goals and overcome challenges.

DISCUSSION QUESTIONS

What are your personal goals for managing your club?

What is one area of your club operations you would like to improve?

How will you ensure good stewardship of club funds?

APPENDIX 3

ROTARY'S ONLINE TOOLS

Resource	What is it?	Who adds or updates content?	Need help?
Rotary.org	Rotary.org is the public face of Rotary, designed to inform the public.	RI staff	website@rotary.org
My Rotary	My Rotary (rotary.org/myrotary) has more detailed information for Rotarians and the family of Rotary. Users don't need to sign in to access some of the content. But with a My Rotary account, you can view and access information tailored to your Rotary role.	RI staff	
Profile and Connections	Rotarians and Rotaractors can manage and personalize their My Rotary profiles, and connect and message each other directly, without exposing personal email.	Rotarians and Rotaractors	social@rotary.org
Discussion Groups	Rotary discussion groups offer a place for Rotarians, Rotaractors, Rotary Peace Fellows, and alumni to share their experiences and ideas with members of the Rotary family from around the world. All discussion groups can be found in My Rotary (must be signed in to access). Join an existing group or start a new one based on your interests.	Rotarians, Rotaractors, and program alumni	social@rotary.org
Rotary Ideas	Rotary Ideas allows Rotary or Rotaract clubs to seek resources for their service projects, such as partners, volunteers, or material and direct financial contributions through PayPal. Project listings can be posted on club or district websites, and the site is open to the public. Leaders are also encouraged to use the site to find projects to partner on and to make other contributions to projects happening in the Rotary community.	Rotary club leaders and Rotaract club presidents	social@rotary.org
Rotary Showcase	Rotary Showcase allows Rotarians and Rotaractors to share successful project stories, photos, and video with one another and the public. It also allows them to identify partners and report the project's contribution to Rotary's global impact. Data can be synchronized with Rotary Club Central.	Rotarians and Rotaractors	social@rotary.org
Rotary Club Central	Rotary Club Central allows club leaders to enter and update membership, service, and Foundation giving goals, which district leaders can view and edit. Leaders have access for the years before, during, and after their term. All Rotarians can view their club's goals. Service projects can be imported from the Grant Center and Rotary Showcase.	Club and district leaders	cds@rotary.org
Events	Rotarians and Rotaractors can register for the Rotary Convention and learn about other upcoming events.	RI staff	website@rotary.org
Brand Center	Rotarians can customize and download materials that use the new Rotary voice and visual identity guidelines.	RI staff	graphics@rotary.org

<u>Grant Center</u>	The Grant Center is for district qualification and applying for district and global grants.	Rotarians applying for grants	<u>grants@rotary.org</u>
<u>Learning Center</u>	The Learning Center provides e-learning materials to help Rotarians and others learn new skills, prepare for leadership roles, and use Rotary <u>tools</u> to accomplish their goals.	RI staff	<u>learn@rotary.org</u>

NOTES on Running Your Club