

Rotary



Rotary International District 5830

Club Administration and Club Finances

May 2, 2026



LEARNING OBJECTIVES

Be knowledgeable about ClubRunner

- **District vs. Club versions**
- **Administrative Functions**
- **Access Rights**

ClubRunner Versions

District version – *accessible by all Rotarians in district (website only)*

- Member data (only club's)
- Officer data (only club's)
- Club information (only club's)
- Summary attendance Information (club's only)

Club version – *subscription paid by club, accessible by club Rotarians only*

- All the above except detailed attendance tracking
- Club website
- Document storage
- Event management

ClubRunner District Version Administration Page

Home Page Editing

- Home Page Stories
- Story Management
- Edit Home Page Links
- Download Files
- Site Pages Management
- Photo Albums Management
- Documents Download
- Website Sponsoring Area
- Website Sponsoring Guide
- Website Designer 3.0
- Edit Meta Tags **NEW!**
- Edit Favicon Logo
- Image Library
- Google Analytics **NEW!**

Communication Services

- Email Message Services
- Email All Members
- District Organization Chart
- Committee Management
- Members Email Status report
- Email Traffic Report
- Edit Bulletins
- Archived Bulletins **NEW!**

Events

- Event Calendar
- Event Planner (Version 2) | Old Version
- MyEventRunner (new window)

District, Clubs & Membership

- District Dashboard
- Club & Membership Detail
- Member Detail
- Request Member Updates
- Member Access Rights
- Clubs Attendance Management
- Edit Executives and Directors
- Download Member Data
- Member Data Changes
- RI Integration Archive | Member Synchronization
- Reports
- Member Designations
- District eDirectory Builder 2.0

For Members

- Edit My Profile
- Change My Password
- District Directories
- Search Member eDirectory
- My Committees

For Club Executives

- Active Members List
- Other Users List
- Inactive Member List
- Club Information Page
- Define Club Executives
- Club Attendance Report
- Define Club Attendance Manager
- Switch on Data Integration with RI
- Missing RI Member ID Report
- RI Updates Archive
- RI Member Synchronization



ClubRunner Club Version Administration Page

My ClubRunner

[Edit My Profile](#)
[Change My Password](#)
[Upload My Photo](#)
[My Commitments](#)
[My New Member Activities **NEW!**](#)
[My Friends](#)
[View Club Directory](#)
[View Club Photo Directory](#)
[eDirectory Reports 2.0](#)
[View Printable Mailing Labels **NEW!**](#)
[Email Message Centre **NEW!**](#)
[View Club Documents](#)
[My Attendance](#)
[My Committees](#)
[My Billing Account Balance](#)

Website Manager

[Website Designer 3.0](#)
[Edit Home Page Links](#)
[Edit Stories](#)
[Edit Events 2.0](#)
[Edit Speakers](#)
[Edit Download Files](#)
[Edit Site Pages](#)
[Edit Photo Albums](#)
[Edit Club Documents](#)
[MyEventRunner Registration \(new window\)](#)

Club eBulletin

[Edit Bulletins **NEW!**](#)
[Send Bulletin](#)
[Archived Bulletins **NEW!**](#)

Membership Manager

[Club Dashboard](#)
[Active Member List](#)
[Other Users List](#)
[Inactive Members List](#)
[Friends of the Club](#)
[Bulletin Subscribers](#)
[New Member Program](#)
[Dues & Billing](#)
[RI Integration](#)
[Request Member Updates](#)
[Edit Executives and Directors](#)
[Committee Management](#)
[Birthday & Anniversary Report](#)
[Gender Distribution \(Summary\)](#)
[Download Member Data **NEW!**](#)
[Member Designations](#)

Meeting Services

[Input Attendance](#)
[Report Make-ups](#)
[Print Member List/Attendance Sheet](#)
[Print Member List \(Simple Version\)](#)
[Attendance Report](#)
[Monthly Club Report](#)
[Customized Attendance Report](#)
[Edit Duty Roster - Who Does What](#)
[Member Leaves of Absence](#)
[Member Attendance Exemption](#)

Administrator

[Edit Club Info & Settings](#)
[Edit Meta Tags](#)
[Upload/Remove Meeting Venue Map](#)
[Edit Club Logo **NEW!**](#)
[Edit Custom Fields](#)
[Website Sponsorship Area](#)
[Upload Sponsorship Guide](#)
[Google Analytics **NEW!**](#)



Nova - ClubRunner Club Version Administration Page

Site Administrators

Site Administrators Executives Editors Members

Welcome to Nova!

We're thrilled to have you with us! Explore the new features, and if you have any questions, suggestions, or thoughts to share, we'd love to hear from you. [Join the conversation in our Community](#) or [share your feedback directly](#). Your input helps make Nova even better!

[Visit Community](#) →

[Give Feedback](#)



Changeover Training May 4 - May 14, 2026



Brush up on your ClubRunner skills and knowledge for your upcoming role by attending our changeover training sessions!

[Register today](#) →

ENGAGEMENT

Communication

Get in touch with members and non-members alike with targeted email and newsletters.

[Send Email](#) →

[Send Bulletin](#) →

[Help](#)

Events & Volunteering

Publicize and organize your events, speakers and volunteer schedules.

[Create Event](#) →

[Create Signup List](#) →

[Help](#)

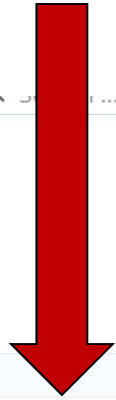
Attendance

Track meeting attendance for members and guests, run reports and report to your District.

[Dashboard](#) →

[Reports](#) →

[Help](#)



Nova - ClubRunner Club Version Administration Page



Communication

Get in touch with members and non-members alike with targeted email and newsletters.

[Send Email →](#)

[Send Bulletin →](#)

[? Help](#)

[Email Services](#)
[Campaigns](#)
[Mobile Notifications](#)
[Email Templates](#)

[Bulletins](#) [? Help](#)
[Bulletin Send History](#)
[Email Traffic Report](#)
[Manage Blocked Emails](#)



Events & Volunteering

Publicize and organize your events, speakers and volunteer schedules.

[Create Event →](#)

[Create Signup List →](#)

[? Help](#)

[Event Planner](#)
[Event Types](#)
[Calendar Items \(Recurring\)](#)
[Cloud Events \(Tickets\)](#)
[MyEventRunner](#) [↗](#) [? Help](#)

[Speakers](#)
[Volunteers](#)
[Member Hours Report](#)
[Club Hours Report](#)

Nova - ClubRunner Club Version Administration Page



Attendance

Track meeting attendance for members and guests, run reports and report to your District.

[Dashboard →](#)

[Reports →](#)

[? Help](#)

[Meeting List](#)

[Leaves of Absence](#)

[Report Makeups](#)

[Dashboard](#)

[Guest Reports](#)

[Rules & Settings](#)

CLUB & MEMBERSHIP MANAGEMENT



Membership

Get the complete picture on your membership with reporting, directories and analytics.

[Active Members →](#)

[? Help](#)

[Active Members](#)

[Inactive Members](#)

[Other Users](#)

[Contacts](#)

[Members and Contacts List](#)

[Prospects](#)

[Member Directory](#)

[Designations](#)

[Request Membership Updates](#)

[New Member Program](#)

[Custom Member Fields](#)

[Download Member Data](#)

Nova - ClubRunner Club Version Administration Page



Organization

Manage key information and functions of your club.

[Club Information →](#)

[? Help](#)

- Club Information
- Executives & Directors
- Committees
- Documents
- Privacy Policy

- Orders
- Invoices
- Payments
- Meeting Responsibilities
- Participation Points



Reports

Stay on top of trends within your club demographics with data at your fingertips.

[Club Activity Report →](#)

[Member Activity Report →](#)

[? Help](#)

- Club Dashboard
- eDirectory Reports
- eDirectory Builder
- Login Activity
- Rule of 85

- Years of Service
- Birthdays & Anniversaries
- Gender Distribution
- Age Distribution
- Printable Mailing List



M
A
P
Membership Action Plan

Nova - ClubRunner Club Version Administration Page



RI Integration

Synchronize club, member and executive data with Rotary International's database.

[Compare & Synchronize →](#)

[? Help](#)

[Integration Settings](#)
[Member Updates Archive](#)
[Club Updates Archive](#)

[Compare & Synchronize Members](#)
[Compare & Synchronize Executives](#)
[RI Updates Archive](#)

WEBSITE MANAGEMENT



Website Designer

Create a modern, mobile friendly website that reflects your club's unique style.

[Home Page Designer →](#)

[? Help](#)

[Settings](#)
[Menu](#)
[Footers](#)

[Themes](#)
[Page Templates](#)

Nova - ClubRunner Club Version Administration Page



Website Content

Expand your digital reach with current and relevant content to engage your members.

[Home Page Content →](#)

[Content Libraries →](#)

[? Help](#)

[Story Library](#) [+ Create Story](#)

[Story Tags](#)

[Sponsors](#)

[Image Library](#)

[Forms](#) [+ Create New Form](#)

[Photo Albums](#) [+ Create Photo Album](#)

[Pages](#) [+ Create Page](#)

[Download Files](#) [+ Add Download File](#)



Rotary Resources



Brand Center

Central hub for photos, videos, templates, and other Rotary-branded elements.

[Rotary Brand Center →](#)

[People of Action](#) [↗](#)

[General Downloads](#) [↗](#)

[Create a Logo](#) [↗](#)

[Promote Rotary](#) [↗](#)

[Ways to Strengthen Our Brand](#) [↗](#)

Nova - ClubRunner Club Version Administration Page

Help

[Support Centre](#)

[Webinars](#)

[Service Updates](#)

[On Demand Demos](#)

[Submit a Ticket](#)

[Community Forums](#)



LEARNING OBJECTIVES

Be knowledgeable about Club Administration

- **Advance preparation**
- **Nuts & bolts of running your club**
- **Calendar 2026-27**

Club Documents

Standard Club Constitution

- Updated every three years after COL
- Cannot be modified by club

Suggested Club Bylaws

- Club can develop own bylaws
- Must not be in conflict with Club Constitution

Others Included in Document Retention Plan

- Club charter
- Articles of Association or Incorporation
- Tax identification number notices
- Board minutes

Club Documents



CLUB PRIVACY POLICY TEMPLATE

(for clubs not subject to the EU's General Data Protection Regulation)

Each club should adopt a privacy policy that describes how the club handles the personal data it collects, stores, transmits, shares, disposes of, or otherwise uses. Personal data includes a person's name, postal or email address, telephone number, gender, financial data, or other sensitive information that might identify him or her. To learn more, consult "[Protecting Personal Data](#)", an online course found on Rotary's Learning Center accessed through My Rotary.

Although Rotary does not require clubs to have a privacy policy or to use this template, if your club has a privacy policy:

1. Club members, donors, and other club constituents will feel more confident about supporting your club.
2. It may help your club comply with local privacy laws.
3. It may help your club be more consistent when handling personal data and records.



Officers Job Descriptions

[Resources by Role](#) | [My Rotary](#)

<https://my.rotary.org/en/knowledge-and-resources/resources-and-reference/resources-by-role>

Club Roles

Are you considering taking on a committee role or looking forward to your year as a club president, treasurer, or secretary? Learn what to expect and how to prepare.

President »

As club president, you lead and motivate your club, ensuring that members feel appreciated, inspired, and connected to each other.

Treasurer »

As club treasurer, you help your club carry out service projects, raise funds, and support The Rotary Foundation.

Secretary »

As club secretary, you help your club run smoothly and effectively. You also monitor club trends, identify strengths and areas for improvement, and share this information with club and district leaders.

Committee Member »

As a club committee member, you help make your club a successful, thriving, and fun place. Whether you've been appointed as a committee chair or serve as a committee member, you help your club work effectively in your community.

Club Officers training resources

learn.rotary.org/members/learn/catalog/view/67



Search content in the platform



[Back](#) | [Course Catalogs](#) > [Club Leadership](#)

Club Leadership

CATEGORIES

FILTERS

Search...



CARDS ▾

NAME A-Z ▾

18 Items



Club Administration Committee Essentials

ENROLLED

8 courses | 3h 00m

Learning plan



Club Learning Facilitator Essentials

6 courses | 1h 30m

Learning plan



Club Membership Committee Essentials

11 courses | 5h 00m

Learning plan



Club President Essentials 1

ENROLLED

9 courses | 3h 45m

Learning plan



Club President Essentials 2

9 courses | 4h 15m

Learning plan



Club Public Image Committee Essentials

ENROLLED

9 courses | 2h 45m

Learning plan



Club Rotary Foundation Committee Essentials



Club Secretary Essentials



Club Service Projects Committee Essentials



Club Treasurer Essentials



Creating a Club Culture of Belonging



Managing Club Business



What You Do

Lead Your Club

- Preside over club and board meetings
- Appoint committee chairs & members
- Conduct quarterly club assemblies
- Create a club budget and manage finances
- Develop a safe environment for youth participants
- Work with your District Governor and Assistant Governor
- Support the Rotary Foundation

How to Prepare

Planning before you take office is crucial to achieving your objectives for your club. Work with your governor and club leadership team to set annual goals that support your club's strategic plan.

- Take online courses at the Learning Center ([Sign in - Rotary Learning Center](#))
- Assess your club's strength & weaknesses, opportunities, risks
- Develop an action plan for your goals
- Appoint committee chairs
- Ensure continuity in leadership & service projects
- Attend district events

Nuts & Bolts

- You are the CEO of your club
- You are your club's cheerleader – brag, brag, brag
- Essentials – good treasurer, secretary, committee chairs
- Essential committees: public image, membership, RI Foundation, administration, service projects & fundraisers
- Utilize Rotary Club Central – enter goals, officers, track goals

Nuts & Bolts (cont'd)

Monthly board meetings

- Create an agenda – distribute prior
- Call to order, roll call, recorder
- Reports from president secretary, treasurer, committee chairs and have votes to approve each (Robert's Rules of Order)
- New business
- Adjourn

Robert's Rules of Order

- **Motion** – A member makes a motion to propose an action or make a decision by saying, “I move to...”. Another member must second the motion by saying, “I second the motion.” Once someone seconds the motion, the group votes on the motion. It passes by a majority vote or a quorum depending on the rules in the bylaws.
- **Amend a motion** – Members use this process to change a motion and can do so by stating, seconded and voted upon.



Robert's Rules of Order (cont'd)

- **Commit** – Members use this type of motion to transfer a motion to a committee. As with other types of motions, it must be seconded and voted upon. Once it moves to a committee, the committee presents a report on the committed motion at the next meeting.
- **Question** – Members say, “I call the question” to end a discussion. The motion must be seconded and voted upon without further discussion. A call for the question requires a two-thirds majority vote to pass. At this point, the members must immediately vote on the motion on the floor.
- **Adjourn** – This refers to moving to end the meeting. A member would say, “I move to adjourn,” and another member would second the motion. If the majority then votes to adjourn, the meeting is over.



Presidential Calendar 2026-27

Prior to July 1

- > Appoint and confirm your leadership team
- > Enter your officers and chairs in RC Central before June 1
- > Set your goals and enter them in RC Central before June 1
- > Prepare and submit Club Project Grant application to District 5830 before June 1

July is Maternal and Child Health Month

- > Consider having club assembly this month to discuss goals, club strengths, opportunities
- > Encourage club members to give to the Rotary Foundation, encourage use of Rotary Direct

Presidential Calendar 2026-27 (cont'd)

July (cont'd)

- > Encourage members to register at MY ROTARY and Club Runner
- > Hold your monthly board meeting
- > **CONFIRM THAT RI AND DISTRICT DUES HAVE BEEN PAID.**

August is Membership and New Club Development Month

- > Consider event to inform community about your club's activities, accomplishments
- > Hold your monthly board meeting

September is Basic Education and Literacy Month

- > Consider special event to promote basic education and literacy
- > Prepare a quarterly progress report in meeting 26-27 goals and communicate to club members

Presidential Calendar 2026-27 (cont'd)

September (cont'd)

- > Hold your monthly board meeting
- > October 5 -11 is Rotary Alumni Reconnect Week

October is Community Economic Development Month

- > Consider having club assembly this month to discuss quarterly progress report you prepared last month
- > Select a nominating committee to develop a slate of officers for 2027-28
- > October 24 is World Polio Day – consider special event to observe this event, register your event at endpolio.org
- > Annual Heart2Heart project visit to Mexico is date TBD



Presidential Calendar 2026-27 (cont'd)

October (cont'd)

- > Hold your monthly board meeting

November is Rotary Foundation Month

- > Have you completed your Club Project Grant? If so, file your final report with District 5830 Foundation Chair
- > Consider special event highlighting the Rotary Foundation
- > Start planning your club Christmas party
- > November 2-8 is World Interact Week
- > Payment and reservation forms are due Rotary 5830 RYLA by November 29
- > Deadline to file 990 returns with IRS is November 15
- > Hold your monthly board meeting

Presidential Calendar 2026-27 (cont'd)

December is Disease Prevention and Treatment Month

- > December 15 is last day for early registration discount for the Rotary Int'l Convention in Barcelona, Spain
- > Identify, nominate and select a President-Elect by Dec. 15 and promote his/her attendance at Lone Star PETS
- > Prepare a quarterly progress report in meeting 26-27 goals and communicate to club members
- > RYLA camper registrations are due Rotary District 5830 RYLA by December 31
- > Ensure that membership is updated in Club Runner and transferred to My Rotary before January 1.

Presidential Calendar 2026-27 (cont'd)

December (cont'd)

- > Hold annual meeting for officer elections & present mid-year report, together with financial report for previous year
- > Hold your monthly board meeting

January is Vocational Service Month

- > Consider having club assembly this month to discuss quarterly progress report you prepared last month
- > Conduct vocation-related activities & programs
- > Verify that the January semi-annual report has been rec'd by RI
- > **CONFIRM THAT RI DUES HAVE BEEN PAID.**
- > Heart2Heart annual project visit date TBD
- > South Central Rotary Youth Exchange Winter Conference—date TBD

Presidential Calendar 2026-27 (cont'd)

January (con't)

- > Hold your monthly board meeting

February is Peacebuilding & Conflict Prevention Month

- > Lone Star PETS – February 25-February 28
- > Rotary International Anniversary – February 23
- > Hold your monthly board meeting

March is Water, Sanitation, and Hygiene Month

- > Prepare a quarterly progress report in meeting 26-27 goals and communicate to club members
- > World Rotaract Week is March 9-15
- > March 31 – preregistration discount ends for the RI Convention
- > Deadline for checks and applications for 4-Way Speech Contest is March date TBD
- > Hold your monthly board meeting

Presidential Calendar 2026-27 (cont'd)

April is Environmental Month

- > Rotary International Convention registrations and cancellations are due April 30
- > Consider having club assembly this month to discuss quarterly progress report you prepared last month
- > Hold your monthly board meeting

May is Youth Service Month

- > District Training Assembly at a date TBD – ensure your club officers attend
- > Consider club event to celebrate youth
- > Prepare a quarterly progress report in meeting 26-27 goals and communicate to club members
- > Hold your monthly board meeting



Presidential Calendar 2026-27 (cont'd)

May (cont'd)

- > Review goals and achievements in Rotary Club Central and update
- > Review year-to-date monthly contribution report to determine club's success in Rotary Foundation giving goals. Encourage further giving where needed.
- > Prepare and submit Club Project Grant application to District 5830 before June 1
- > Hold your monthly board meeting

June is Rotary Fellowship Month

- > Report club performance in meeting Presidential Citation Goals at Rotary Club Central
- > Recognize and thank donors for their gifts to the Rotary Foundation

Presidential Calendar 2026-27 (cont'd)

June (cont'd)

- > Rotary Int'l Convention – Barcelona, Spain is June 26-30
- > Ensure contributions are sent to the Foundation before June 30
- > Ensure that membership is updated in Club Runner and transferred to My Rotary before July 1.
- > Consider having club assembly this month to discuss quarterly progress report you prepared last month
- > Hold your monthly board meeting (FINAL – you are done!!!)

LEARNING OBJECTIVES

Be knowledgeable about Club Finances

- **Important club documents**
- **Rotary dues paid by clubs**
- **Rotary club tax issues**

Rotary Dues Paid by Clubs

Rotary International Dues

- Invoiced on July 1 and January 1
- Based upon membership on those dates
- Amount authorized by COL
- Both invoices include dues and subscriptions
- July 1 invoice includes COL and insurance

Rotary District 5830 Dues

- Invoiced on July 1 only
- Based upon membership on prior January 1
- Amount authorized by club President Elects



**30 Second
Break!**



Non-Profit Taxes

Federal Tax Status

- Must have Employer Identification Number (EIN)
- Covered by Group Exemption 573 when chartered
- IRC Sec. 501(c)(4) – Tax exempt organization
- **NOT** IRC Sec. 501(c)(3) Tax exempt “charitable”
- Payments are NOT “charitable deductions”

Federal Tax Reporting Obligations

- One of 990 versions - based upon “gross receipts”
- \$50,000 or less - 990-N – online filing
- \$50,000 to \$200,000 – 990-EZ
- Over \$200,000 - 990

Non-Profit Taxes - continued

Federal Tax Reporting Obligations-continued

- Due 4 ½ months after year end (November 15)
- LOSE EXEMPTION - Fail to file three years in a row

Texas Tax Reporting Obligations

- Must file AP-204 to receive sales tax exemption
- Exempt from Sales Tax on purchases
- Exempt from collecting Sales Tax on sales for one event per year



Non-Profit Taxes - continued

Raffles by 501(c)(4) organizations

- Ticket price is NOT a deductible contribution
- IRS Form W-2G if winning exceeds \$600 and is 300 times the cost of the ticket
- Income tax withholding may also come into play
- State gaming laws need to be heeded
 - Promoted within local area only
 - No Internet presence (i.e. Facebook, etc.)



Non-Profit Taxes - continued

Silent Auctions

- Value of item is NOT a deductible contribution
- Winning bid is NOT a deductible contribution

Any Comments or Questions?



Thank You!



Mike Groom

- Past District Governor 2021-22
- District 5830 Finance Committee Chair
- Zone 31 End Polio Now Coordinator 2022-2025

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