**CLUB ADMINISTRATION**

* Sign in to My Rotary at [www.rotary.org](http://www.rotary.org)
* Go to the **Manage** tab and choose **Club Administration**

**Only current club officers (president, secretary, treasurer, executive secretary, membership, foundation) reported under My Rotary can add/edit data in the Club Administration section.**

**CLUB FINANCES**

* Under **Club Invoice** you can see your current and previous RI club dues invoices and balance due. You can also make a payment online on this page.

**CLUB & MEMBER DATA**

**UPDATE MEMBER DATA**

**Add, Edit, Remove Members**

* Click on **Add, Edit, Remove Members** and a list of all current and honorary members will appear on your screen
* To **View**, **Edit** or **Terminate** an existing member click on the appropriate button
  + For **Terminate** make sure you enter a reason and date. If the date is more than 30 days in the past you must email [data@rotary.org](mailto:data@rotary.org) and ask them to do the termination for you.
* To **Add** a new member, click on **Add Members** at the top
  + If the new member is transferring from another club, click on **Search for an Existing Member** to look them up. When their name comes up at the bottom of the screen, click on it to pre-populate their information and then add the information required at the bottom. You can **Edit** their information if necessary after you add them as a member.
  + Click **Continue** if you are adding a brand-new member to Rotary and fill in all necessary data. Make sure to put in an email address.
* To run a report of your members that you can print or turn into and Excel spreadsheet, look for **Reports** at the top of the membership list screen and click on **Membership.**
* To run Foundation giving reports go to **Reports** and then **CRS.** The list of Foundation reports will come up and you can choose what you want.

**Add, Edit Incoming Officers**

* Click on **Add, Edit, Remove Club Officers**
* Scroll down to **Assigned Incoming Year Officers**
* Edit each of the positions you are ready to by clicking **Assign** next to the position. A list of your club members will come up and you hit **Add** next to the name of who you are assigning the position to
* When that person’s name & contact information appears, hit **Add Incoming Officer**
* Double check the position and years are correct on the next screen and hit **Submit**
* You can hit **Done** or **Add More** to continue with adding more officers

If you ever need to change an officer, hit **Remove** next to their name and then follow the procedure above to add the new person.

**Add, Edit Current Officers**

* Follow the same format as above only work with the sections titles **Assigned Current Year Officers** and **Unassigned Current Year Officer Positions.**

**UPDATE CLUB DATA**

This section allows you to update mailing address, club meeting place & time, RI invoice delivery preferences and partner organization. Click on any of the items in this section to enter the update screen.

**ROTARACT** and **CLUB SPONSORSHIP**

Here is where you can look up and maintain information on any other clubs you sponsor such as Rotaract, Interact and Satellite clubs.

**CLUB GIVING**

Note that club Rotary Foundation giving reports are accessed using the instructions above under **Add, Edit, Remove Member.**

Under club giving you can donate to the Rotary Foundation **Online** or using the **Printable Forms.** You can send in donations for several club members at one time using the **Multiple Donor Form** or for a single member using the **Individual Donor Form.**

**FORMS & INSTRUCTIONS**

In this sections you will find forms & instructions for:

* **Name Change**
* **Merger –** merging 2 clubs together
* **Member Confirmation** – to confirm a transferring member is in good standing
* **Insurance and IRS**

**OFFICIAL DIRECTORY**

The online directory can be used to search for any club or district in the world and will provide addresses and contact information.

**BRAND CENTER**

* Sign in to My Rotary at [www.rotary.org](http://www.rotary.org)
* Go to the **Manage** tab and choose **Brand Center**

There are a lot of great Rotary stories, images and videos in the Brand Center to use to promote Rotary in your community. Take time to look around at some of this.

**GUIDELINES**

This section shows you how to use the Rotary resources in Brand Center. Use **Identity at a Glance** as your guide on the proper use, colors and size of the Rotary logo

**LOGOS**

All Rotary **Logo** files are found here and can be downloaded for your use.

**MATERIALS**

* **Club Resources –** templates for updating your club materials such as brochures, newsletters, presentations, stationery, etc.
* **Create Your Own** – online tools to create your club logo and brochure.
* **Promotional Resources** – guidelines, templates and resources to help you plan an promote club projects and events.

**Take time to look at the other resources under MY ROTARY – Exchange Ideas, Take Action, Learning & Reference, The Rotary Foundation, News & Media, and Member Center.**

**ROTARY CLUB CENTRAL**

* Sign in to My Rotary at [www.rotary.org](http://www.rotary.org)
* Go to the **Manage** tab and under **Club & District Administration** choose **Rotary Club Central**
* You can also find **Rotary Club Central** under **Online Tools** on the My Rotary Home menu when you log in or click on **Home** near the top of the page on the left-hand side to get to the Home screen.

**\*\*\*IMPORTANT\*\*\***

**You can add/change goals for the next Rotary year only if you are listed as the incoming president for that year through Club Administration in My Rotary.**

When the **Rotary Club Central** screen comes up you will be in **Club View.** Note the 3 tabs at the top – **Your Club, Service, Foundation Giving.** As you scroll down when on any of the tabs you will see **Trends** and then **Goals and Progress.** Under **Goals and Progress** there will be 3 tabs for last year, the current year and next year.

**Procedure for setting goals:**

* Under **Goals and Progress** choose the tab for next year (2017-18)
* Use the **Edit** button to add/change goals. Be sure to hit the **Save** button when you are done with each section.
* Goals can be changed at any time if you need to.

**YOUR CLUB**

* **Membership** – the number of members you hope to have at the end of your year as president
* **Rotarian Engagement** – the number of members you hope to engage in each of the areas listed
* **Communication** – self explanatory
* **Public Relations** – self explanatory

**SERVICE**

* **Service Projects & Activities –** the number you hope to do during the year
* **Clubs for Young Leaders –** the number of Rotaract & Interact clubs you will sponsor
* **Youth Program Participants –** the number of inbound & outbound youth exchange and RYLA participants you will sponsor

**FOUNDATION**

* **Annual Fund –** the amount of $$ your members will give to the Annual Fund during the year; this is the main fund of the Rotary Foundation that is used for global and district grants
* **Polio Plus Fund –** the amount your club/members will give to the Polio Plus Fund during the year
* **Major Gifts and Endowment Fund –** the number of members of your club you hope will become **Major Donors** ($10,000 cumulative giving), **Bequest Society** (give $10,000 or more via estate plan), and **Benefactors** (Endowment Fund as a beneficiary in estate plans or a donation $1,000 or more to the fund outright)

**Note that the Support & Strengthen Clubs section of the 2017-18 PRESIDENTIAL CITATION can be achieved by setting and tracking your goals in Rotary Club Central.**