



NEW CLUB INVOICE: FREQUENTLY ASKED QUESTIONS

What is the reason for the change?

The Rotary International Board of Directors approved the change to a single-page invoice and new membership reporting requirements to simplify the invoice process. By reporting new members earlier, you give them the chance to engage with Rotary much sooner. The new invoice also eliminates the need for your club to fill out worksheets, recalculate dues owed, and write in new members. Instead, your club receives a one page form that clearly states the amount it owes.

How does the change make the dues process easier?

Beginning January 2015, each club will receive a one-page invoice that clearly states the amount of membership dues, subscriptions totals, and any outstanding balances it owes Rotary. The invoice will replace the multipage mailing that included a cover page, the semiannual report, worksheets, new member forms, the club roster, and a set of detailed instructions. You will no longer need to recalculate the amount your club owes because your invoice will use membership numbers reported to Rotary by 1 January and 1 July of each year.

How do I report membership changes?

Club officers can update membership on Rotary.org by navigating to Manage→Club Administration→Add/edit/remove member. Learn how to [add](#), [edit](#), and [remove](#) members.

Alternatively, membership changes can be emailed to data@rotary.org or faxed or mailed to your Rotary International office or fiscal agent.

Who is responsible for reporting membership changes?

Club secretaries are primarily affected by this change. They are responsible for adding new members, removing terminated members, and making any other changes in membership data within 30 days of their occurrence. They also must report incoming club officers by 1 February each year. [Learn how to add new club officers](#).

All club officers (president, secretary, treasurer, Foundation chair, membership chair, and executive secretary) can edit membership data on Rotary.org. If your club doesn't have a secretary or if your

secretary is unable to make membership updates, the club can choose another officer to help with this new responsibility.

When is the last date I can report membership changes to ensure my club's invoice reflects our current membership list?

We are asking club secretaries to report membership changes within 30 days, but in all cases, no later than 1 January and 1 July. If a member joins or leaves the club any time from 1 December through 1 January or from 1 June through 1 July, you must report the change as soon as possible to meet the 1 January or 1 July deadline. For example, if a member leaves a club effective 1 January, you should remove the member from the membership list on or by 1 January so the club isn't assessed dues for that member for the period going forward. Similarly, if a new member joins on 1 January, add the member on or by 1 January.

If your changes must be entered manually, such as new members added through an [integrated local database](#) (see [integration options](#) on the [Member Data Integration](#) page), or changes reported by fax or mail, we strongly advise you to send your changes well before the deadline so the data can be updated and the bill generated on time.

Membership will be calculated based on a member's admission or termination date, rather than the date the change was entered. For example, if a member is terminated effective 27 January but the member is removed from the membership list on 28 December, that member will still be included on the club's January invoice.

When will I see updates reflected in my club's membership list?

Updates made on Rotary.org are reflected in Rotary International's database immediately. Updates made via an integrated local database require time for manual processing (see information about data integration above).

When do I need to update my club's magazine subscriptions in order to be reflected on the invoice?

You must make updates to your magazine subscription information by 1 January and 1 July.

Report subscription changes (switching from *The Rotarian* or *Revista Rotaria* to an approved regional magazine or vice versa, or a change in delivery format, including bulk distribution) to Data Services at data@rotary.org and to the regional magazine's office, if applicable. The subscription to the chosen publication will continue for the entire billing period.

How do I set up an account on rotary.org so I can update my club's membership list?

To create an account on rotary.org, go to www.rotary.org/myrotary, select sign in/register, then create account. Enter your name and email address and certify that you are 18 years or older; [this guide](#) will walk you through the process. You will receive an email with a link to complete the registration process and to create a password and security question. If you have questions, contact your [club and district support](#) representative.

Should we continue to use the integrated local database we've been using to make membership updates?

Yes. If your club uses an integrated local database, you should always make your membership updates in that instead of on Rotary.org. The same integration rules will apply, and the updates will satisfy the new reporting policies as long as they are made within 30 days of the membership change. For questions about member data integration and whether your database is integrated, see [integration options](#) on the [Member Data Integration](#) page.

Why doesn't rotary's database reflect the changes I reported using an integrated local database?

The most common reason is that the local database was not officially integrated with Rotary International's. This is a two-step process: First, a club officer must opt in to the integration by selecting the vendor of the local database on Rotary.org (Manage→Club administration→Add or remove vendor partner organization); then, the club must opt in to direct integration via the local database (instructions will vary based on the local database provider). Also, club IDs and member IDs must match those listed in Rotary International's database. Consult your local database provider if you have questions.

When will I receive the invoice?

Invoices will be sent to clubs by the end of January and July.

Who will receive the invoice?

All club officers will receive the club invoice by email if they have a valid address registered in the Rotary database. Add ri.clubfinance@rotary.org to your contacts so emails from Rotary International aren't rejected or filtered as SPAM. Your club will also receive an invoice by mail if it has not opted out of a paper version. [Learn how to update your club's email or mailing address and how to opt out of the paper invoice.](#)

Will I be able to make adjustments on the invoice?

No. All membership updates should be made on Rotary.org so that they are reflected in Rotary's records by 1 January and 1 July each year. That will ensure that the invoice includes the club's most up-to-date membership figures. Clubs will be billed for all active members as of 1 January and 1 July and will be required to pay the amount shown on the invoice.

Will we get a credit or refund for a member who was reported but then decided not to join our club?

No. There are no refunds for membership dues. Report members *after* they have been officially inducted into your club and have paid club dues.

If you need assistance with your invoice, contact your [financial representative](#).

Will I get a list of members with my invoice?

No. Starting with the July 2015 invoice, a member list will no longer be sent. As a club officer, you can find your club's official membership list and other supporting information used to calculate your invoice on Rotary.org; navigate to Manage→Club Administration→Club Invoice→Invoice detail.

How much time will I have to review and pay the invoice?

Clubs are required to pay the balance upon receipt of the invoice.

What will happen if we can't pay our invoice right away?

Beginning January 2015, clubs will be subject to termination for nonpayment of dues 120 days after the club invoice is issued.

What is the exchange rate used for payment?

Rotary International exchange rates are evaluated monthly. Payments will be credited at the official rate applicable when the payment is received. [See current exchange rates](#). Using the wrong exchange rate will generate an underpayment or overpayment on the club account that will be reflected on the next invoice.

How is a transferee from another club accounted for on our invoice?

That will depend on whether the member was included on the former club's invoice for the preceding payment cycle. If the former club *did* pay the member's per capita dues on its preceding January or July invoice, your club will not be required to pay the member's dues until the next invoice. If this member was

not included on his or her former club's invoice, your club will be assessed pro rata dues for the member on the next invoice.

How does the new reporting process apply to satellite clubs?

Satellite clubs are under the administrative jurisdiction of their sponsor clubs and don't make membership updates. Officers of the sponsor club send changes to Data Services at data@rotary.org and pays dues for the satellite club.

Will official membership start figures be available earlier than they have been?

Yes. Because membership numbers will be considered certified as of 1 July, the official membership start figures will be available no later than 15 August. Additionally, as of June 2015, official year-end membership figures will no longer be published. From July 2015 on, clubs and districts should use the official start figures to track growth and retention.

My question wasn't answered here. Can someone help me?

You can send general questions to clubinvoice@rotary.org and one of our staff will contact you. If you have specific questions, please ask your [financial representative](#) or your [Club and District Support](#) representative.