

To begin planning for these improvements, Rotary is asking club and district officers to share the new invoicing and reporting policies with club members, and to prepare their clubs for monthly reporting. Also, encourage your club members to immediately report changes to their membership status to club officers, so this information can be updated in your club's membership records. The existing SAR process will remain in place until 1 January 2015, and all the related materials will continue to be available through the website.

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 in order to simplify the invoice process. By reporting new members earlier, you will enable them to engage with Rotary much sooner. Also, the new invoice 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 THIS AFFECT ME AS A CLUB OR DISTRICT OFFICER?

Club secretaries are the officers primarily affected by this change. They are responsible for updating membership information – that is, adding new members and removing terminated members, within 30 days. They also must report incoming club officers by 1 February each year. Others play an important supporting role. Club and district officers should be aware of the change and provide support to club secretaries so they can update club membership data in a timely way.

WHEN IS THE LAST DATE I CAN REPORT MEMBERSHIP CHANGES TO ENSURE THAT MY CLUB'S INVOICE REFLECTS THE 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. Note that a member who joins or leaves the club at any time in December or June must be reported as soon as possible to meet the 1 January or 1 July deadline. For new members added via an integrated local database (see integration options on the Member Data Integration page), or any other membership changes that require manual processing (those sent via fax or mail), Rotary strongly encourages clubs to send their changes well before the deadline so that the data can be updated and the bill generated within the prescribed time frame. 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 termination is entered on 28 December, that member will still be included on the club's January invoice.

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. The club will also receive an invoice by mail if the club has not opted out of a paper version.

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 appearing on the invoice.

WILL I GET A LIST OF MEMBERS WITH MY INVOICE?

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 on Rotary.org; navigate to Manage ☐ Club administration ☒ Semiannual dues invoices ☐ SAR membership list

WHEN WILL I RECEIVE THE INVOICE?

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

HOW MUCH TIME WILL I HAVE TO REVIEW AND PAY THE INVOICE?

Clubs are required to pay all outstanding dues upon receipt of the invoice. Beginning in January 2015, clubs will be subject to termination for nonpayment of dues 120 days after the club invoice was issued.

HOW IS A TRANSFEREE FROM ANOTHER CLUB ACCOUNTED FOR ON OUR INVOICE?

That will depend on whether this member was included on his or her former club's invoice for the preceding payment cycle. If the former club did pay this member's membership dues in the preceding January or July, 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.

WHO IS RESPONSIBLE FOR REPORTING MEMBERSHIP CHANGES?

Club secretaries 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. All club officers (president, secretary, treasurer, Foundation chair, membership chair, and executive secretary) can edit membership data on Rotary.org. If your club does not have a secretary, or your club's secretary is unable to make membership updates, the club can choose another officer to help with this new responsibility.

HOW DO I REPORT MEMBERSHIP CHANGES?

Club officers can update membership on Rotary.org by signing in and navigating to Manage ☐ Club administration ☐ Add/edit/remove member.

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.

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 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 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).

DOES THE NEW REPORTING PROCESS APPLY TO SATELLITE CLUBS?

While all Rotarians should be aware of the changes, only Rotary club officers are required to make membership updates. Because satellite clubs are under the administrative jurisdiction of their sponsor clubs, the club officers of the sponsor club are responsible for making membership updates and paying dues for the satellite club until that club receives its own charter.