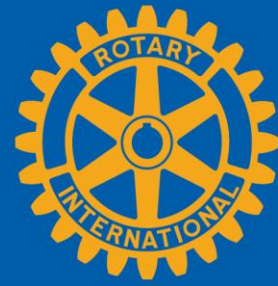


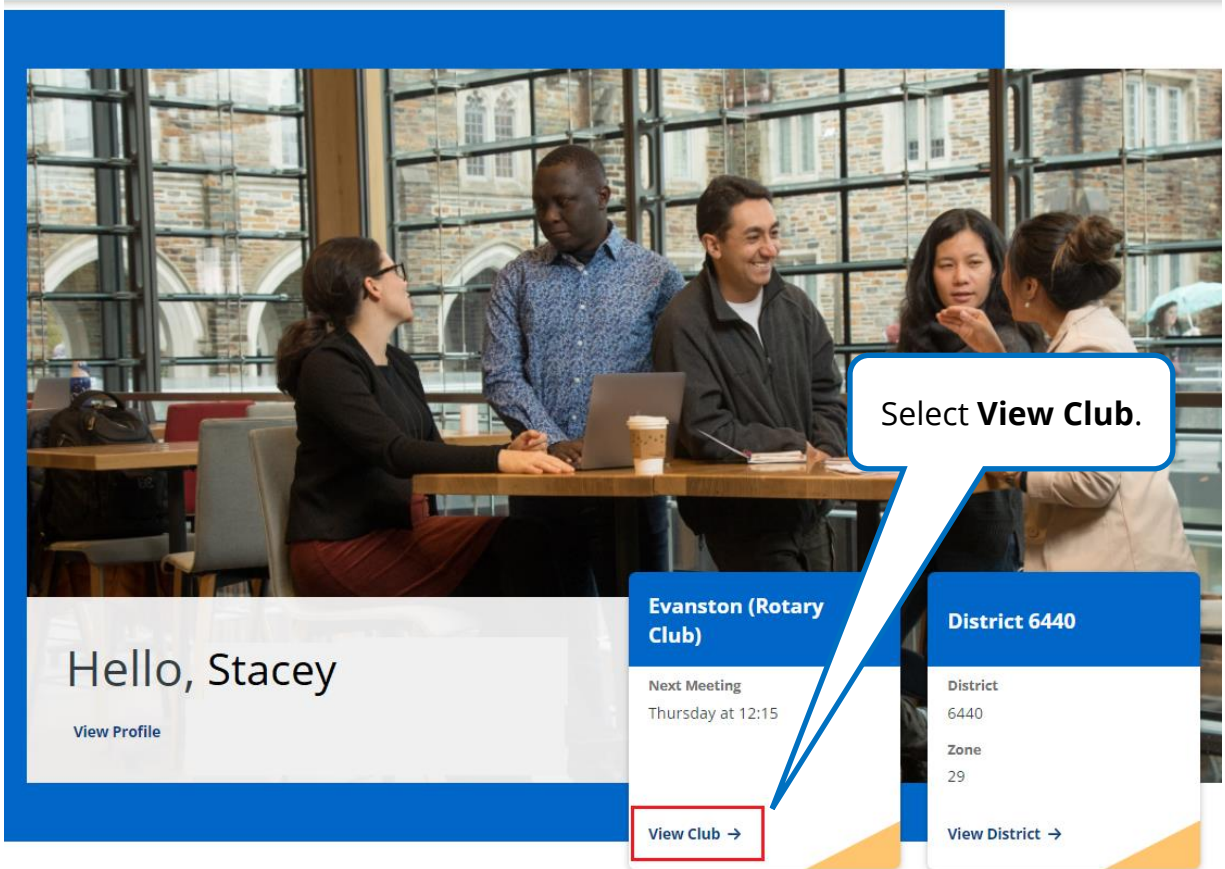
# HOW TO CHOOSE OR CHANGE A CLUB MANAGEMENT SYSTEM



**GO TO YOUR CLUB'S PAGE**

A screenshot of the My Rotary website. At the top, there are links for "Rotary.org", "Brand Center", "English", "Sign In", and "Register". Below this is the "My Rotary" header with a "Donate" button, a "Get Involved" button, and a search icon. The main content area features a large image of people at an event. Overlaid on this image is the text "Welcome to My Rotary" and "Sign in or register to access your personalized My Rotary portal." Below this text is a red-bordered box containing the "Sign in" and "Register" links. A blue callout box points to the "Register" link with the text: "Go to My Rotary and sign in. Or select **Register** to get a My Rotary account." Below the main image, there is a section titled "Easy access to resources" with three links: "Rotary Club Central", "Grant Center", and "Membership and Foundation Reports".

Many clubs have a club management system: software they can use to manage their member data and other information and share it with RI. To use one, you'll need to designate it in My Rotary. Before you do that, go to the vendor's website and arrange for the service. Go to [rotary.org/memberdata](https://rotary.org/memberdata) for more information and to find a vendor.



Hello, Stacey

[View Profile](#)

**Evanston (Rotary Club)**

Next Meeting  
Thursday at 12:15

[View Club →](#)

**District 6440**

District  
6440

Zone  
29

[View District →](#)

Select **View Club**.

On your club page, scroll down to **Club Management Systems**.

## Club Management Systems

Vendors

 **EDIT**

Select **EDIT** to make any changes to your club management systems.

# DESIGNATE A CLUB MANAGEMENT SYSTEM YOU'LL USE TO UPDATE DATA


## Edit Club Management Systems

A Rotary or Rotaract club can simplify its recordkeeping and support Rotary programs and membership by using one or more club management vendors to share club members' personal data among the club. Rotary International and the club management vendor link its own membership records to Rotary International's database. A district or zone may also use a vendor to view club members' personal data if the club allows that vendor access to club information. (Note that, though more than one vendor may be authorized to view a club members's personal data, only one may update the data.)

First, your club must be a customer of a club management vendor. Find a list of the vendors that provide database services on the Club Management Systems & Website Providers page of My Rotary. Then, your club can allow the vendor access to club members' personal data by choosing the appropriate link below.

Please visit RI's Privacy Policy (found at <https://my.rotary.org/en/privacy-policy>) for more information about how RI processes personal data. Please consult with the Club Management Vendor to determine its practices for processing personal data.

Note: You can allow multiple vendors view-only access but only one vendor can update your data. Repeat this process as many times as necessary if you allow multiple vendors view-only access to your club data.

Vendor	Start Date	Access Type	Access For
			

Select **+ ADD VENDOR**.

# Add Club Management Vendor

Please review the Agreement below and click on "I Agree" to authorize Rotary International to complete the data integration process and submit your authorization.

## Rotary Club and Rotaract Club Authorization to Initiate Data Integration Agreement

### SELECT THE VENDOR AND ACCESS LEVEL

Club Management Vendor\*

Vendor Access Level\*

- View & Edit Access. Allow the vendor to view and edit your club data.
- View-Only Access. Allow the vendor view-only access to your club data.

Choose the vendor you have an agreement with from the list.

Select **View & Edit Access**.

Scroll down and check the **Certification** box.

 **Certification\***

I agree to the terms and conditions set forth in this Rotary Club and Rotaract Club Authorization to Initiate Data Integration Agreement.

Start Date

6/29/2020

By clicking the "I agree" button, I make the representations and warranties and agree to abide by the terms and conditions set forth below and, authorize RI to complete the data integration process in [rotary.org/myrotary](https://rotary.org/myrotary).

Select **I AGREE**.

If your district or zone also uses a data management system, and it is the same one your club uses, you don't need to do anything more. If your district or zone uses a different system, you'll need to authorize that vendor to view (but not edit) your club's data.



# DESIGNATE A CLUB MANAGEMENT SYSTEM TO VIEW CLUB DATA

## Edit Club Management Systems

A Rotary or Rotaract club can simplify its recordkeeping and support Rotary programs and membership by using one or more club management vendors to share club members' personal data with the club's Rotaract system and the club's membership records to Rotary International's database. A district can also use a club management vendor to share its own membership records to Rotary International's database. (Note that, though multiple vendors can be used, only one may update the data.)

First, your club must be a customer of a club management vendor. For more information on the Club Management Systems & Website Providers page, click the link below.

Please visit RI's Privacy Policy (fourth paragraph) for more information on how Rotary International processes personal data. Please consult with the Club Management System vendor for more information.

Note: You can allow multiple vendors view-only access but only one vendor can update your data. Repeat this process as many times as necessary if you allow multiple vendors view-only access to your club data.

If your club and district use different data management systems, you can add the district's vendor to allow it to view your club's data.

Vendor	Start Date	Access Type	Access For	
ClubRunner	04/11/2016	View & Edit	My Club	TERMINATE

+ ADD VENDOR

Select + **ADD VENDOR** to add a view-only vendor.

### Rotary Club and Rotaract Club Authorize Data Integration Agreement

#### SELECT THE VENDOR AND ACCESS LEVEL

Club Management Vendor\*

Vendor Access Level\*  
 View-Only Access. Allow the vendor view-only access to your club data.

Please indicate why you're authorizing Rotary International to enable club data integration with the vendor:

- Club intends to use vendor's services to manage club data
- District intends to use vendor's services to view club data

Choose the vendor your district or zone uses from the Club Management Vendor list.

Select **View-Only Access**.

Specify who will be able to view club data (your club or the district).



Scroll down and check the **Certification** box.

**Certification\***

I agree to the terms and conditions set forth in this Rotary Club and Rotaract Club Authorization to Initiate Data Integration Agreement.

**Start Date**

6/29/2020

By clicking the "I agree" button, I make the representations and warranties and agree to abide by the terms and conditions set forth below and, authorize RI to complete the data integration process in [rotary.org/myrotary](https://rotary.org/myrotary).

Select **I AGREE**.

**I AGREE**

**CANCEL**

# Edit Club Management Systems

A Rotary or Rotaract club can simplify its recordkeeping and support Rotary programs and membership by using one or more club management vendors to share club members' personal data among the club, Rotary International and the club management vendorlink its own membership records to Rotary International's database. A district or zone may also use a vendor to view club members' personal data if the club allows that vendor access to club information. (Note that, though more than one vendor may be authorized to view a club members's personal data, only one may update the data.)

First, your club must be a customer of a club management vendor. Find a list of the vendors that provide database services on the Club Management Systems & Website Providers page of My Rotary. Then, your club can allow the vendor access to club members' personal data by choosing the appropriate link below.

Please visit RI's Privacy Policy (found at <https://my.rotary.org/en/privacy-policy>) for more information about how RI processes personal data. Please consult with the Club Management Vendor to determine its practices for processing personal data.

Note: You can allow multiple vendors view-only access but only one vendor can update your data. Repeat this process as many times as necessary if you allow multiple vendors view-only access to your club data.

Vendor	Start Date	Access Type	Access For	
ClubRunner	04/11/2016	View & Edit	My Club	TERMINATE
Swiss RCMS - SEMDA	06/29/2020	View-Only	My District	TERMINATE

[+ ADD VENDOR](#)

Both vendors are now listed on the Edit Club Management Systems page.

You can use multiple vendors to view club data. But because view-only vendors can't update club data, changes you make through their software will not be made in Rotary's database.

# CHANGE THE CLUB MANAGEMENT SYSTEM YOU USE TO UPDATE CLUB DATA

## Edit Club Management Systems

A Rotary or Rotaract club can simplify its recordkeeping and support Rotary by using a club management vendor to share club members' personal data among the club, Rotary International, and the club's website. A district or zone may also use a vendor to view club information. (Note that, though more than one vendor may be authorized to view club information, only one vendor can update club information.)

First, your club must be a customer of a club management vendor. Find a list of Club Management Systems & Website Providers page of My Rotary. Then, your club can allow a vendor to view club information. Click the link below.

Please visit RI's Privacy Policy (found at <https://my.rotary.org/en/privacy-policy>) and consult with the Club Management Vendor to determine its practices for processing club information.

Note: You can allow multiple vendors view-only access but only one vendor can update your data. Repeat this process as many times as necessary if you allow multiple vendors view-only access to your club data.

From your club page, scroll down to **Club Management Systems** and select **EDIT**. On the page that opens, select **TERMINATE** next to the vendor with **View & Edit** access.

Vendor	Start Date	Access Type	Access For	
ClubRunner	04/11/2016	View & Edit	My Club	TERMINATE
Swiss RCMS - SEMDA	06/29/2020	View-Only	My District	TERMINATE

+ ADD VENDOR

Are you sure you want to terminate this vendor?

This cannot be undone.

Select **CONFIRM**.

CONFIRM

CANCEL

You can now add another vendor and allow it to view and edit club data.