

Club Secretary Education

Pennsylvania District
July 2022



Housekeeping Notes

- Introduce yourself by entering name and club in the Chat box
- Ensure you stay on Mute unless speaking.
- Utilize Raise Hand feature to ask a question.
- This will be as interactive as possible put your questions in the chat.
- Save Chat Feature is available.



Agenda

- Introduction
- Pennsylvania District
- Job description
- Online reporting and tools
- Required forms
- Important dates

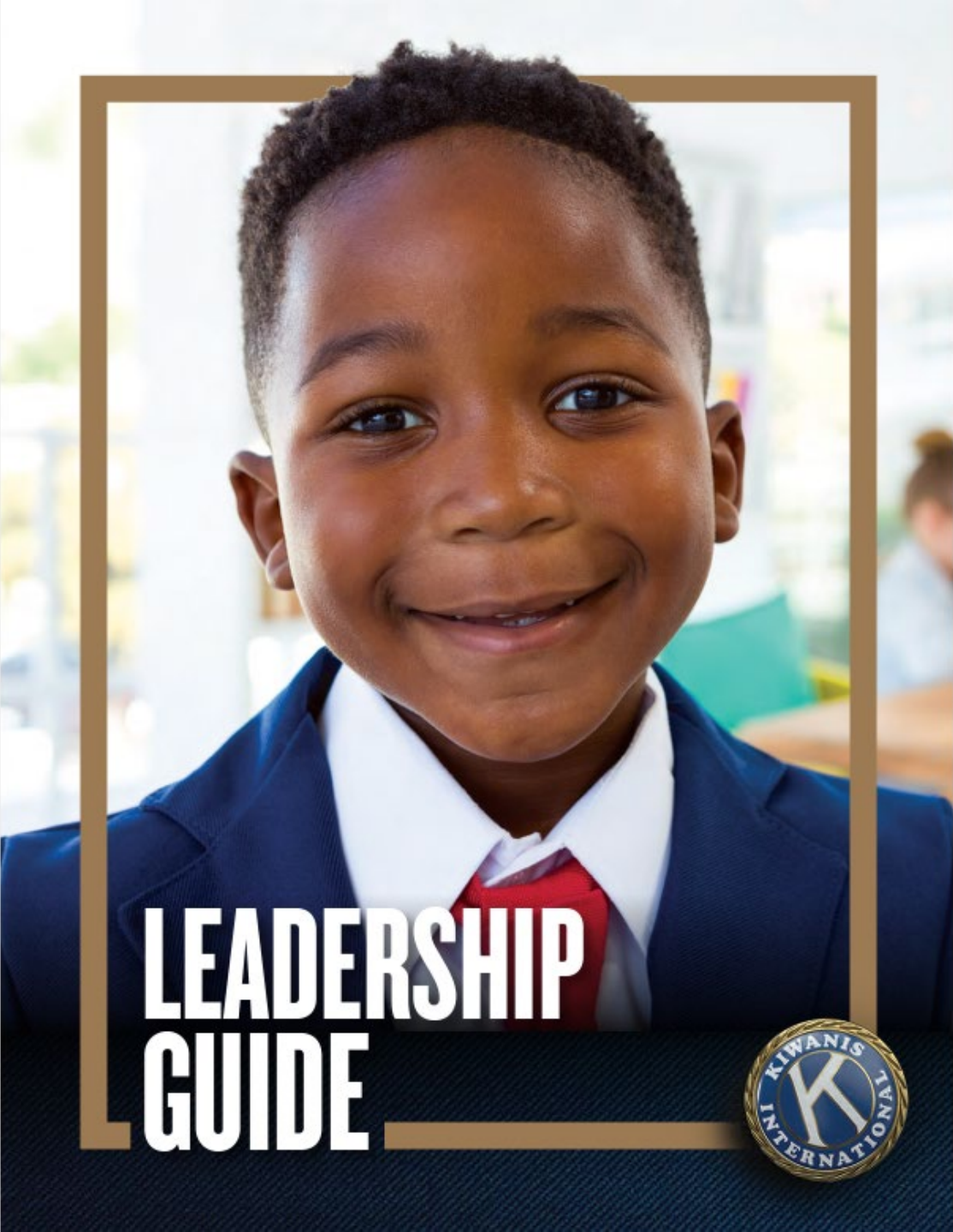


Kiwanis International Trainings

Kiwanis International will be offering online CLE on the following dates:

- August 1 (President)
- August 2 (Secretary)
- August 3 (Treasurer)
- August 4 (Membership)
- It is recommended that you participate.



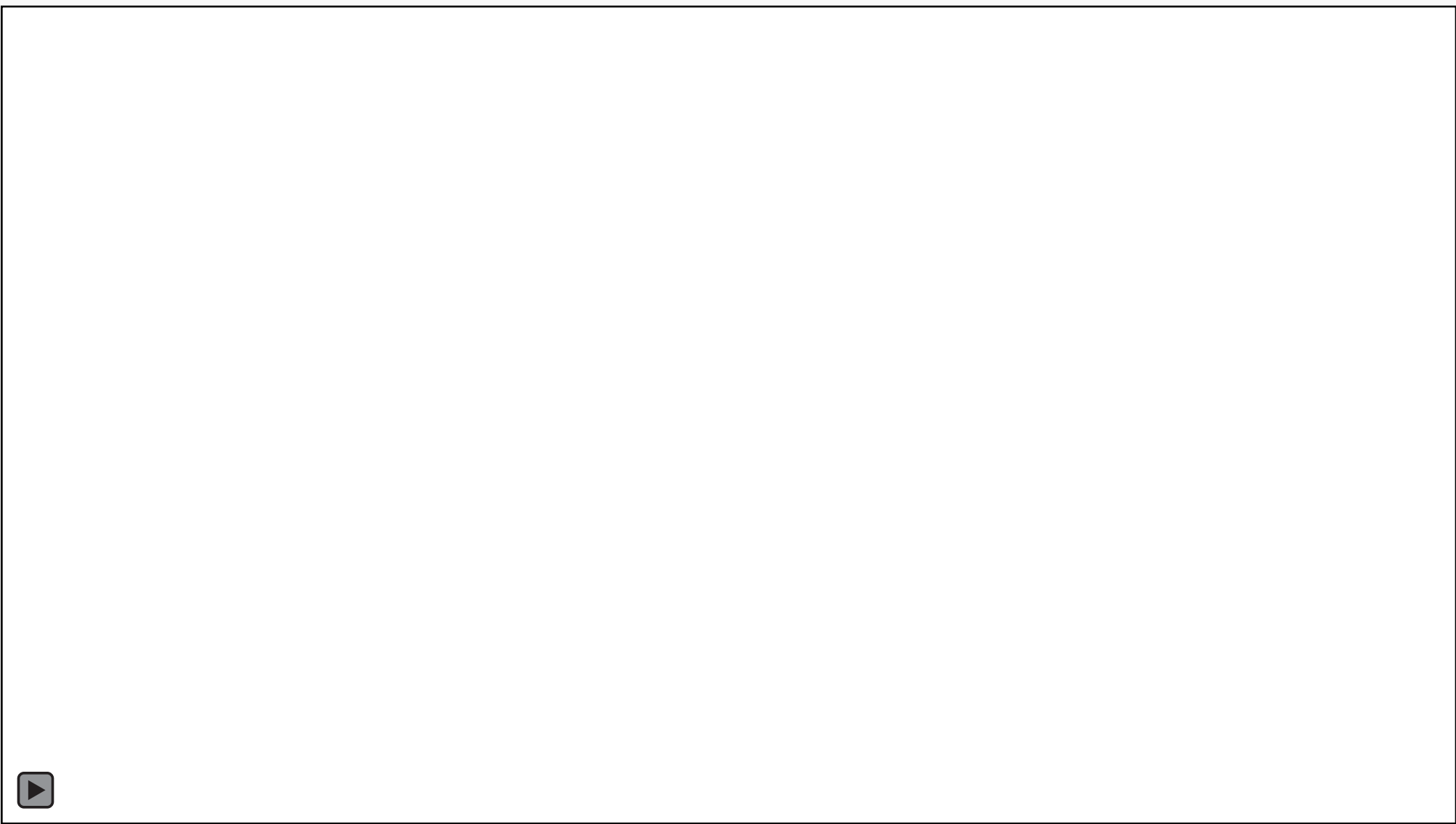


Leadership Guide

<https://bit.ly/2022LeadershipGuide>

SCAN ME





Kiwanis[®]



Opening Activity

- What is your favorite children's book?
- Why is that your favorite children's book?



Pennsylvania District

Our Leadership Structure, Goals and Initiatives



Pennsylvania Kiwanis – District Office

Executive Director

Kevin Thomas



Administrative Assistant

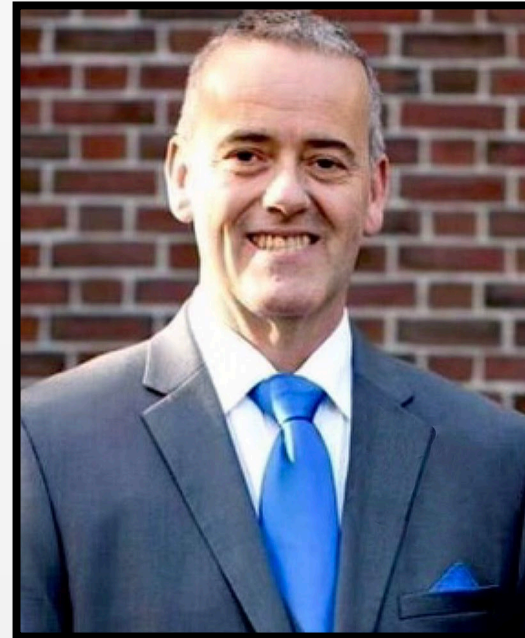
Michelle March



Pennsylvania Kiwanis – District Officers 2022-2023

Governor

Mike Coolbaugh



Immediate Past Governor

Sarah Zulueta



Governor-Elect TBD*

Candidate: Conrad Schlesinger



**Elections will be held at 2022 District Convention*



Pennsylvania Kiwanis - Trustees 2022-2023

Region 1 – Cathy Szymanski

Region 2 – Shawn Smith

Region 3 – Miranda Burton

Region 4 – Penny Meyers

Region 5 – Ryan Hartman

Region 6 – Tiffany Callaio

Region 7 – Joe Wilson



Pennsylvania Kiwanis – Lt. Governors 2022-2023

Division 1 – Cal Morse

Division 2 – Terry Schaeffer

Division 5- Wayne Meyer

Division 6 – **Vacant**

Division 8 – Janine Surmick

Division 10 – **Vacant**

Division 11W- **Vacant**

Division 11E- **Vacant**

Division 12 N – Lisa Bangson

Division 12 S – Shirley McPherrin

Division 13 N – Emily Reed

Division 13 S – Barrie Ann George

Division 14 – Allan Schappert

Division 15 – Debora Crisman

Division 16 – **Vacant**

Division 17/18- Bob Moran

Division 19 – **Vacant**

Division 21- Dan Spirer

Division 22 – Karen Sears

Club Listings by Region and Divisions:
<https://k23.site.kiwanis.org/club-listing-2/>



Kiwanis Hierarchy High Level Overview

Club



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Region



District



Pennsylvania District Strategic Plan 2021-2024

- A 3-year strategic plan was developed and approved October 9, 2021.
- The plan outlines key strategic priorities:
 - Leadership Education
 - Service Leadership Program Relations
 - Improve Member Experience
 - District Operations
- Review the details of the document on our website at:
<https://bit.ly/PAStrategicPlan>



2022-2023 Governor Priorities

- 1) Improve the member experience
- 2) Share Kiwanis in new communities
- 3) Promote Diversity, Equity, and Inclusion at all levels in Kiwanis
- 4) Strengthen Kiwanis service leadership programs
- 5) Improve District operations



Pillar 1: Membership Goals

- Open seven (7) new Kiwanis clubs.
- Reduce the number of clubs under charter strength by 25%.
- Increase club membership by a net +2 in 25% of clubs.
- Net gain in membership over the previous year, as certified by October 10, 2023



Pillar 2: Service Leadership Programs

- 90% of the service leadership programs be active in their school and communities.
- Have 100% of the service leadership programs be sponsored and have an engaged and active Kiwanis advisor.
- Open two (2) new clubs in Circle K, Key Club, and Builders Club.
- Open five (5) new K-Kids Clubs.



Pillar 3: Justice, Equity, Diversity and Inclusion (J.E.D.I) Initiative

- Continue the Justice, Equity, Diversity, and Inclusion Initiative throughout the district.
- Continue District Convention, Midyear and quarterly J.E.D.I awareness opportunities.



Pillar 4: Leadership Education

- Have 20 members of Pennsylvania clubs participate in Kiwanis Amplify leadership program and provide 50% funding for attendees.
- Have monthly virtual educational opportunities for members.
- 60% of club officers attend Club Leadership education.



Pillar 5: District Leadership and Operations

- Obtain new Lt. Governor leaders in 50% of the vacant **Divisions** by January 1, 2023.
- Review and Update the District Strategic Plan by Oct 8, 2022.
- Continue working on a District Redivisioning Plan.
- Achieve a 90% compliance in mandatory background checks among all required leaders.



2022-2023 District Board Meetings

October 8, 2022*

January 21, 2023

April 22, 2023*

July 22, 2023

*In-Person Meetings and others virtual



Pennsylvania Kiwanis - Early Learning

- Distribution of Early Learning Guides
 - Currently have 4 guides
 - New - Kindergarten HERE I AM (2020)
- Partners with Early Learning Investment Commission and support Pre-K for PA
- *To order guides complete "Learning Guide Order Form" found at:
<https://k23.site.kiwanis.org/early-learning/>*



For more information contact:
Emily Reed, Young Children Priority One Chair
Email: flyingicesticks@gmail.com



District Program

- Member and District initiative
- Support EXISTING members who are impacted by Financial Hardships
- Application: pakiwanis.org → News
- Process is confidential
- Members can donate to program.

DOLLARS FOR DUES
SUPPORT OUR MEMBERS



District Communication Tool

- SendInBlue is a new Customer Relationship Management (CRM) tool
- Emailed to ALL members on the 1st and 3rd MONDAYS of the month
- Make sure members know to mark email from PennsylvaniaKiwanis@gmail.com as NOT SPAM.
- Members can unsubscribe if they wish.



Pennsylvania Kiwanis Foundation



Kiwanis[®]
PENNSYLVANIA KIWANIS FOUNDATION

- New Kiwanis Club grants
- K-family grants
- Scholarships
- Support of Early Learning
- Support of Service Leadership Program



More info at their website:

www.pkfonline.org



Job description



Duties & Responsibilities

*Group Share:
What qualities do you think make for a great secretary?*



DUTIES

- Manage and maintain club and membership records online.
- Maintain club's permanent files.
- Keep minutes of club and board meetings.
- Act as official contact for all club mail correspondence.
- Collect all communications and distribute as appropriate.
- Submit all official reports required by Kiwanis International, the district and the club.
- Perform other duties as may be assigned by the president or board.
- Fulfill all other duties documented in the Standard Form for Club Bylaws.

Club Information



Club secretary view displays:

- Current and incoming club officers
- Club district and division details
- Sponsored service leadership program clubs
- Meeting location, day and time
- Signature project details
- Online profiles (club website, social media accounts)
- Club statistics



Functionality

Club secretaries have the following abilities:

- Update official club detail information
- Update club membership
- Complete monthly reports
- Submit Kiwanis convention voting delegates
- Email members
- Post announcements



Additional Functionality



Club secretaries have the following abilities:

- View and pay club membership charges
- View member background check status information
- Submit officers
- Update service leadership program advisor information
- See club historical data
- Share files



Member Information

Club secretaries can update membership data in the following way:

- Add new members of various types (regular, former SLP, corporate, satellite, transfer, former, honorary, spousal, dual).
- Edit existing member information (address, phone, email, birthdate, sponsor, spouse/partner, gender)
- Delete members
- Download/export member listing



Monthly Reports

Club secretaries can work with monthly reports in the following ways:

- Provide club meeting information and attendance
- Provide service project/fundraising data
- Provide partnership data
- Answer annual administrative questions
- Provide donation/giving data
- Share monthly reports with other individuals



Finances



Club secretaries can access financial data in the following ways:

- View and print open invoices
- View and print past paid invoices
- Pay open invoices by credit card
- Request invoice adjustments
- View payment history





COMING JAN 2023

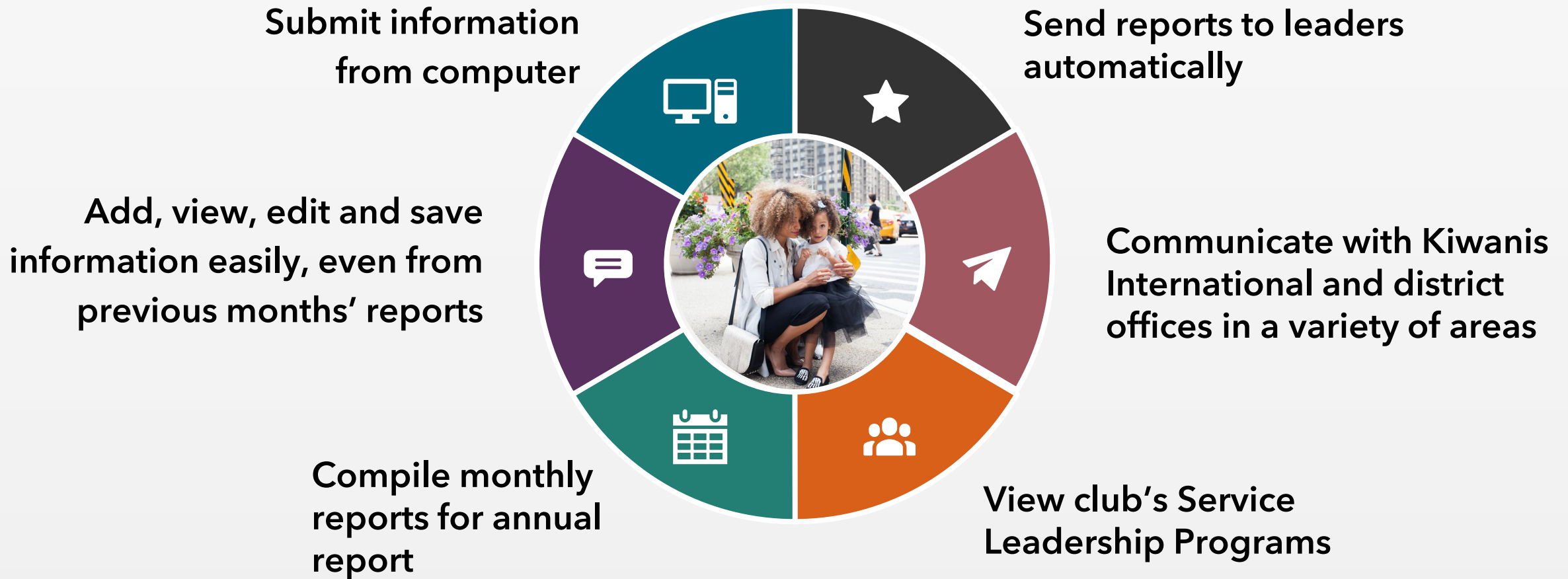
Kiwanis Engage!

What We Know:

- ***Kiwanis Engage*** the new customer relationship management (CRM) tool will replace Kiwanis Connect.
- This will be online tool and available to same groups of users.
- The framework of this tool will be Salesforce.
- Training expected to be provided by Kiwanis International late October – December 2022

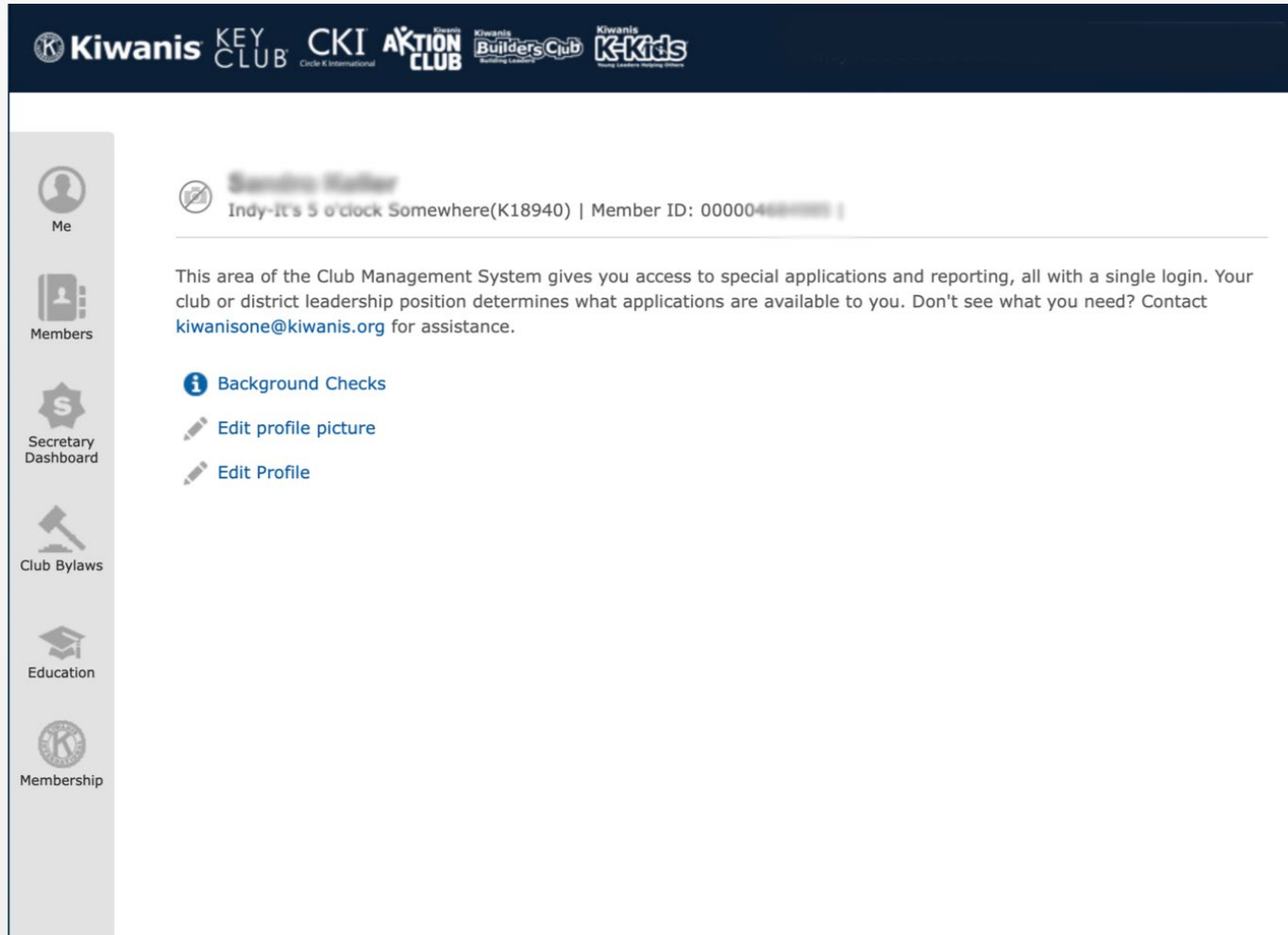


Kiwanis Online Reporting



Kiwanis Connect

<https://members.kiwanis.org/>



The screenshot shows the Kiwanis Connect members portal. At the top, there is a dark blue header with logos for Kiwanis, KEY CLUB, CKI (Circle K International), AKTION CLUB, Kiwanis Builders Club, and Kiwanis K-Kids. On the left side, there is a vertical navigation menu with icons and labels for: Me, Members, Secretary Dashboard, Club Bylaws, Education, and Membership. The main content area displays the user's profile information: a profile picture icon, the name "Somewhere Member", and the text "Indy-It's 5 o'clock Somewhere(K18940) | Member ID: 000004689999 |". Below this, there is a paragraph explaining that the Club Management System provides access to special applications and reporting, and that the user's club or district leadership position determines what is available. A contact email, kiwanisone@kiwanis.org, is provided for assistance. A list of available actions is shown, including "Background Checks" (with an information icon), "Edit profile picture" (with a pencil icon), and "Edit Profile" (with a pencil icon).



Add Member



Me



Members



Secretary Dashboard



Club Bylaws



Education



Membership

Sec. Dashboard Member Admin Monthly Report Annual Report Finances

Member Management

Excel Directory Printable Directory + New Member
























































The Member Management page displays a list of all the current members of your club. Use the tabs below this paragraph to switch between current and former members as needed. Click the appropriate icon in a specific member's row to view, edit or delete the member's information. NOTE: The ability to edit or delete a member's information varies based on what privileges you have in the system. Send an email to memberservices@kiwanis.org if you have any questions.

All Active Corporate Honorary Satellite Former Life Member Spouse Multi Club

Exclude Honorary Members

Show 10 entries

Search:

	Name	Member ID	Email	Details	Edit	Delete	Check [?]	Renewal
1	 [Redacted]	[Redacted]	 [Redacted]				 Sent on 2018/01/11	
2	 [Redacted]	[Redacted]	 [Redacted]					
3	 [Redacted]	[Redacted]	 [Redacted]				 Sent on 2018/01/15	
4	 [Redacted]	[Redacted]	 [Redacted]				 Sent on 2019/05/23	
5	 [Redacted]	[Redacted]	 [Redacted]				 Expires 2017/08/21 	
6	 [Redacted]	[Redacted]	 [Redacted]				 Expires 2020/05/14	
7	 [Redacted]	[Redacted]	 [Redacted]					
8	 [Redacted]	[Redacted]	 [Redacted]					
9	 [Redacted]	[Redacted]	 [Redacted]					



Delete a Member

- Sec. Dashboard
- Member Admin**
- Monthly Report
- Annual Report
- Finances

Member Management

- Excel Directory
- Printable Directory
- + New Member

The Member Management page displays a list of all the current members of your club. Use the tabs below this paragraph to switch between current and former members as needed. Click the appropriate icon in a specific member's row to view, edit or delete the member's information. NOTE: The ability to edit or delete a member's information varies based on what privileges you have in the system. Send an email to memberservices@kiwanis.org if you have any questions.

- All Active**
- Corporate
- Honorary
- Satellite
- Former
- Life Member
- Spouse
- Multi Club

Exclude Honorary Members

Show 10

Search: Taylor

entries

	Name	Member ID	Email	Details	Edit	Delete	Check 	Renewal
17	 Taylor, Meredith	██████████	 mtaylor@kiw: 					

Showing 1 to 1 of 1. *filtered from 19 records

- First
- Previous
- 1**
- Next
- Last



Bylaws



Kiwanis KEY CLUB



CKI Circle K International



AKTION CLUB



Kiwanis Builders Club Building Leaders



Kiwanis K-Kids Young Leaders Helping Others

Sandra Keller

Indy-It's 5 o'clock Somewhere

Revert Impersonation



Me



Members



Secretary Dashboard



Club Bylaws



Education



Membership

Club Bylaws Management Center

Kiwanis Club of Indy-It's 5 o'clock Somewhere (K18940)

Status: Approved

Date adopted by the club:: November 05, 2019 12:00 AM

Date submitted by the club: November 05, 2019 2:42 PM

November 12, 2019 12:00 AM

Congratulations! Your club bylaws have been approved on the date noted above.

[Download](#) a PDF copy of your bylaws, if needed.

To amend your club bylaws after approval, you must

[create a new version](#)

Download PDFs below

- [Bylaws and policies FAQ](#)
- [Blank bylaws and policies template](#)
- [Approved/Current Bylaws](#)

To begin, please click on the word "Review". Please make sure to save each of the pages as you proceed though the process.

If you have questions or concerns, contact Rene Booker, Club Processing Representative, at clubbylaws@kiwanis.org or by phone at 1-800-549-2647 (toll-free in U.S. and Canada) or +1-317-875-8755 (worldwide), extension 203.



Finances



Me



Members



Secretary
Dashboard



Club Bylaws



Education



Membership

Sec. Dashboard

Member Admin

Monthly Report

Annual Report

Finances

Unpaid Orders

Open (unpaid) orders for your club are listed below. These statements include dues, new member add fees, etc. Please check the box for the statements you wish to pay and then click the Print and Pay button at the bottom. You may also select the top checkbox to print and pay them all at one time.

Note: For clubs trying to pay the annual renewal fee for their Builders and KKids clubs, please select the "Renew" button to update your club's information for the new year before paying.

The compiled statements will show itemized expenses and give instructions on where to send payment.

Questions or comments? Send a detailed email to memberservices@kiwanis.org

There are no open orders.



Effective Oct 1, 2022

Member Dues

Kiwanis International dues and fees:

- \$52: Kiwanis International dues
- \$22: Liability insurance & Director's and officer's insurance
- \$8: Magazine publication
- \$35: Pennsylvania District dues

Total DUES: \$117.00



Prorated Dues – NEW members

2022-23 Prorated Dues (New Member Fee)				
Month	Pro-Ration Percentage	Kiwanis International Amount	Pennsylvania District Amount	Total Amount Due
October	0.00%	\$ 82.00	\$ 35.00	\$ 117.00
November	8.33%	\$ 75.17	\$ 32.08	\$ 107.25
December	16.67%	\$ 68.32	\$ 29.17	\$ 97.49
January	25.00%	\$ 61.50	\$ 26.25	\$ 87.75
February	33.33%	\$ 54.67	\$ 23.33	\$ 78.00
March	41.67%	\$ 47.83	\$ 20.42	\$ 68.25
April	50.00%	\$ 41.00	\$ 17.50	\$ 58.50
May	58.33%	\$ 34.17	\$ 14.58	\$ 48.75
June	66.67%	\$ 27.33	\$ 11.67	\$ 39.00
July	75.00%	\$ 20.50	\$ 8.75	\$ 29.25
August	83.33%	\$ 13.67	\$ 5.83	\$ 19.50
September	91.67%	\$ 6.83	\$ 2.92	\$ 9.75



Staying Organized



Required forms

FORMS REQUIRED	
Monthly report form	Complete by the 10th of every month (i.e., October monthly report due on November 10).
Membership reporting for annual dues billing	Update your roster throughout the year, adding and deleting members as necessary. Clubs are given until October 10 to delete any members for which they should not be billed annual dues. Check your roster for updates on club member contact information quarterly.
990, 990-N or 990-EZ form (U.S. clubs only)	File with the IRS by February 15. The 990 form allows your club to maintain its tax-exempt status. Get instructions and links at kiwanis.org/form990 .
Annual report of club elections	Submit to the Kiwanis International Office electronically using the Secretary Dashboard by June 1.



Optional submissions

OPTIONAL	
Proposed amendments and resolutions to the Kiwanis International Bylaws	Submit your proposal in writing to the Kiwanis International Office by October 31 for consideration in the House of Delegates.
Delegate certification forms	File a certification form by April 30 for delegates attending the Kiwanis International convention. Delegate certification forms for your district convention also have deadlines. Check with your district leaders or the district website.



Important Dates

IMPORTANT DUE DATES	
10th of every month	Monthly club report due to the Kiwanis International.
October 1	Your first day in office.
October 1	Approval of club budget due.
October 10	Updated club roster due.
October 31	Deadline for any club to submit proposed amendments and resolutions to the Kiwanis International Bylaws to be presented at the next Kiwanis International convention.
February 15	Deadline for U.S. clubs to submit the 990-tax form to the IRS.
April 30	Delegate certification form for the next Kiwanis International convention due.
June 1	Annual report of club election due.



Youth Protection & Clearances



Youth Protection Guidelines

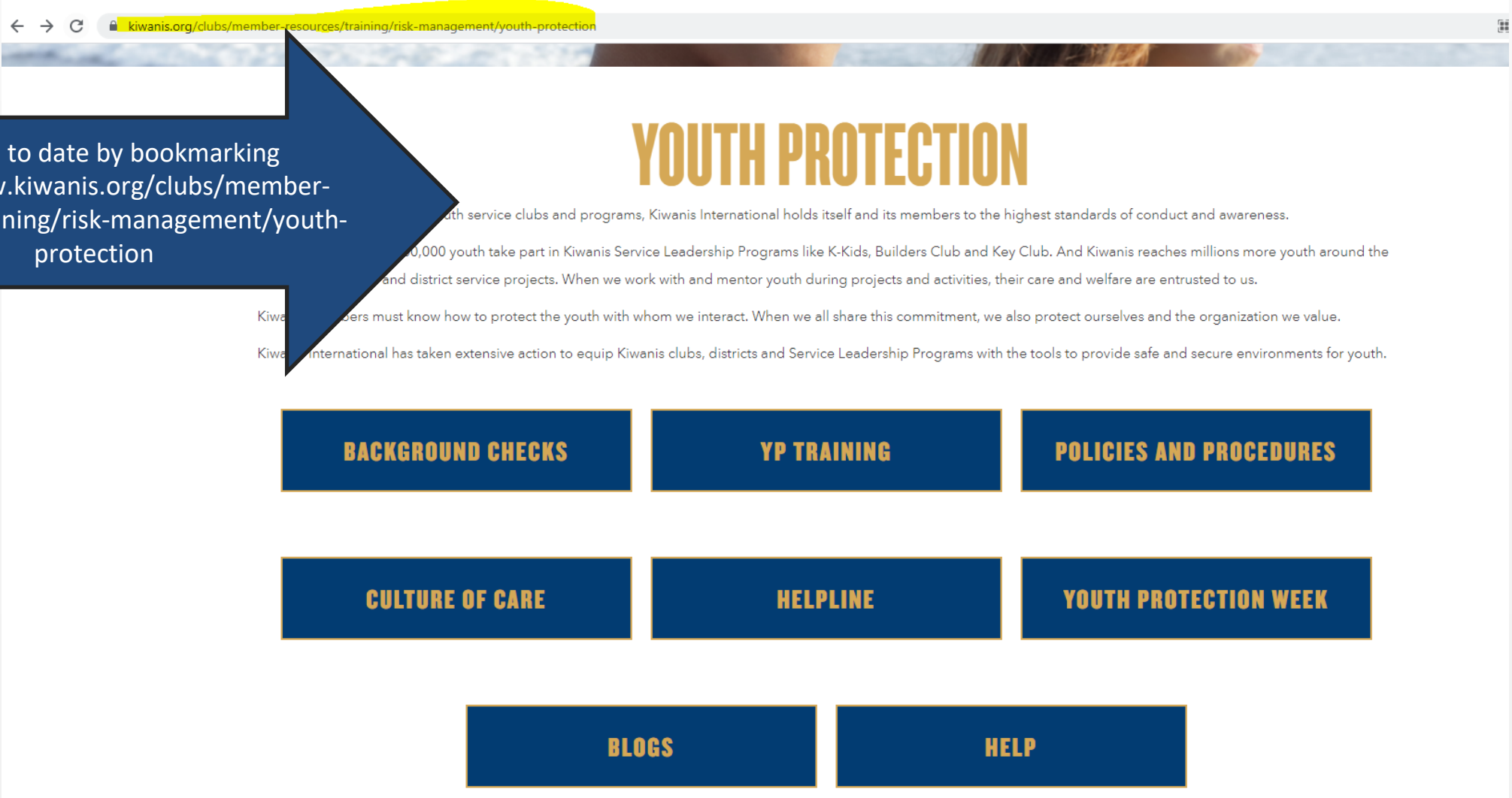
Every Kiwanis club is expected to educate its members on these guidelines, best practices, and what to do when they become aware of youth in potentially harmful situations.



More information contact Ryan Hartman, District Youth Protection, Email: rhartman14@gmail.com



Youth Protection Guidelines



Keep up to date by bookmarking
<https://www.kiwanis.org/clubs/member-resources/training/risk-management/youth-protection>

YOUTH PROTECTION

With service clubs and programs, Kiwanis International holds itself and its members to the highest standards of conduct and awareness. Over 100,000 youth take part in Kiwanis Service Leadership Programs like K-Kids, Builders Club and Key Club. And Kiwanis reaches millions more youth around the world through our clubs and district service projects. When we work with and mentor youth during projects and activities, their care and welfare are entrusted to us. Kiwanis members must know how to protect the youth with whom we interact. When we all share this commitment, we also protect ourselves and the organization we value. Kiwanis International has taken extensive action to equip Kiwanis clubs, districts and Service Leadership Programs with the tools to provide safe and secure environments for youth.

BACKGROUND CHECKS

YP TRAINING

POLICIES AND PROCEDURES

CULTURE OF CARE

HELPLINE

YOUTH PROTECTION WEEK

BLOGS

HELP



Kiwanis International Clearances

KI Clearances required for:

- Service Leadership Program **Kiwanis and Faculty Advisors**
- Service Leadership **District Administrators**
- **Chaperones** that participate in overnight events where youth are present such as Key Leader

KI Provider:

- **Safe Hiring Solutions** – Background Check provider
- **Praesidium Inc** – Youth protection and child abuse courses.

FAST FACTS

- Globally, 1 in 4 youth will suffer some type of abuse or maltreatment (World Health Organization).



- 85% of child abuse victims never report their abuse.

- Abuse is usually at the hands of a known acquaintance or family member, NOT strangers.

90%

- More than 90% of abusers are people children know, love and trust.



PA Clearances

Volunteer background requirement:

- Criminal Record Check
- Child Abuse Check
- FBI Check

Club Resources:

- A Club Youth Protection Policy is strongly recommended. Resources at:
<https://www.kiwanis.org/clubs/member-resources/training/risk-management>
- Great resource for more information:
<http://www.keepkidssafe.pa.gov/resource/clearances/index.htm>



PENNSYLVANIA CHILD ABUSE HISTORY CLEARANCE

00754558000001

TAYLOR R. MEHOLICK
131 SOUTH PARK STREET
SYKESVILLE, PA 15865

CERTIFICATE ID: QF508QRSS
VERIFICATION DATE: 7/22/2015
SOCIAL SECURITY #: XXX-XX-6529
DATE OF BIRTH: 4/2/1997

The above named person has applied for a Pennsylvania Child Abuse History Clearance pursuant to Chapter 63 of 23 Pa. Consolidated Statutes Annotated relating to the Child Protective Services Law. NO RECORD EXISTS in the Pennsylvania Department of Human Services' statewide Central Registry listing the applicant as a perpetrator of an Indicated or Founded report of child abuse or an Indicated or Founded report for school employees.

Applicants are required to show the Administrator the results of their Child Abuse History Clearance. Administrators are required to keep a copy of this Child Abuse History Clearance on file. Any person altering the contents of this document may be subject to civil, criminal or administrative action.

ISSUED BY Commonwealth of Pennsylvania
Department of Human Services
CHILDLINE AND ABUSE REGISTRY
ChildLine Verification Unit
P.O. Box 8170
Harrisburg, PA 17105-8170
1-877-371-5422

ANY ALTERATION OR ERASURE VOIDS THIS DOCUMENT

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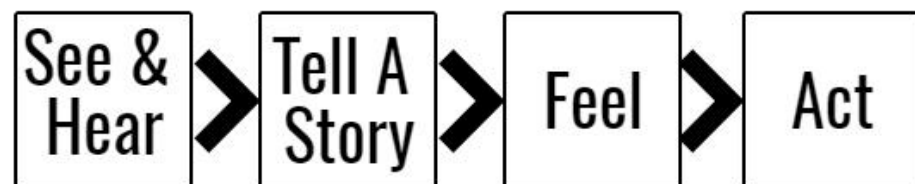
CY8930 - 6/00



Scenarios

INITIAL CONVERSATION

Gut reaction



GIVE YOURSELF SOME TIME

"Let me give this a little more thought."

FOLLOW-UP CONVERSATION

Thinking outside the box



Scenario 1

In the mail, you receive a package from Kiwanis International addressed to you as Club Secretary. Inside you find a workbook for the new Two for Two membership initiative, a program booklet for the upcoming Kiwanis International Convention, a flier for the new Dr. Wil Blechman Fellowship and some additional organizational information. What do you do with these materials?



Scenario 1- Potential Solution

Potential solution - Discuss them with the appropriate officers or chairs within the club – in this case the membership chair, the club president and a Kiwanis Children’s Fund, service or fundraising chair – and determine how these resources and information should be shared with club members. At a future meeting, each item should be discussed with the club to make sure everyone is aware of the various programs and initiatives that are being worked on at the international level.



Scenario 2

You receive an email from your Lt. Governor. They tell you that they would like to schedule a visit with your club and have been trying to get ahold of your club president with no success. How would you handle this situation?



Scenario 2 - Potential Solution

Potential solution - Respond to the Lt. Governor and find out when they would like to visit. Connect with your club president to make arrangements for the Lt. Governor to attend a meeting or service project. Be sure to determine proper protocol for such a visit - if you are unsure, connect with your District Secretary to learn more - before the Lt. Governor arrives. Inform club members that you will have a special guest at an upcoming meeting or event and encourage their attendance.



Scenario 3

You receive several emails from the District office. What is the best approach to handle these communications?

- A) Ignore them
- B) Forward each email to all members
- C) Send ONE summary email with concise information and links about each topic



Scenario 3 – Best Answers

You receive several emails from the District office. What is the best approach to handle these communications?

- A) Ignore them
- B) Forward each email to all members
- C) Send ONE summary email with concise information and links about each topic



Service Leadership Programs



Service Leadership Programs



KEY CLUB[®]

CKI[®]

Circle K International



Branded Programs



KEY LEADER[®]



Relationship Building

- If you sponsor a service leadership program, ensure a Kiwanis Advisor is named.
- Ensure that the Sponsoring Kiwanis club is active and engaged with their youth.
- Invite youth to meetings.
- Attend service projects (if allowed) with youth.
- **Many of our Kiwanians are FORMER SPONSORED YOUTH! Cultivate that relationship!**



Important Opportunities for our Youth

Key Leader

April 21-23, 2023, Camp Conrad Weiser

Key Club Convention

March 31- April 1, 2023, Hershey Lodge

Circle K Events

Interpak – *Tentative* Nov. 11-13, 2022, at Hidden
Valley Scout Reservation

District Convention – TBD March 2023



Wrap Up



Pennsylvania District Calendar

August 11-14, 2022 - Pennsylvania District Convention, Erie, PA

August 20, 2022 - Aktion Club Convention, Altoona, PA

September/October 2022 - Installation of Officers

October 1, 2022 - Kiwanis year starts

October 10, 2022 - Rosters finalized

February 2023 - TBD - Midyear Conference

June 21-24, 2023 - Kiwanis International Convention, Minneapolis, MN

August 10-13, 2023 - Pennsylvania District Convention, Scranton, PA

September 30, 2023 - Kiwanis year ends

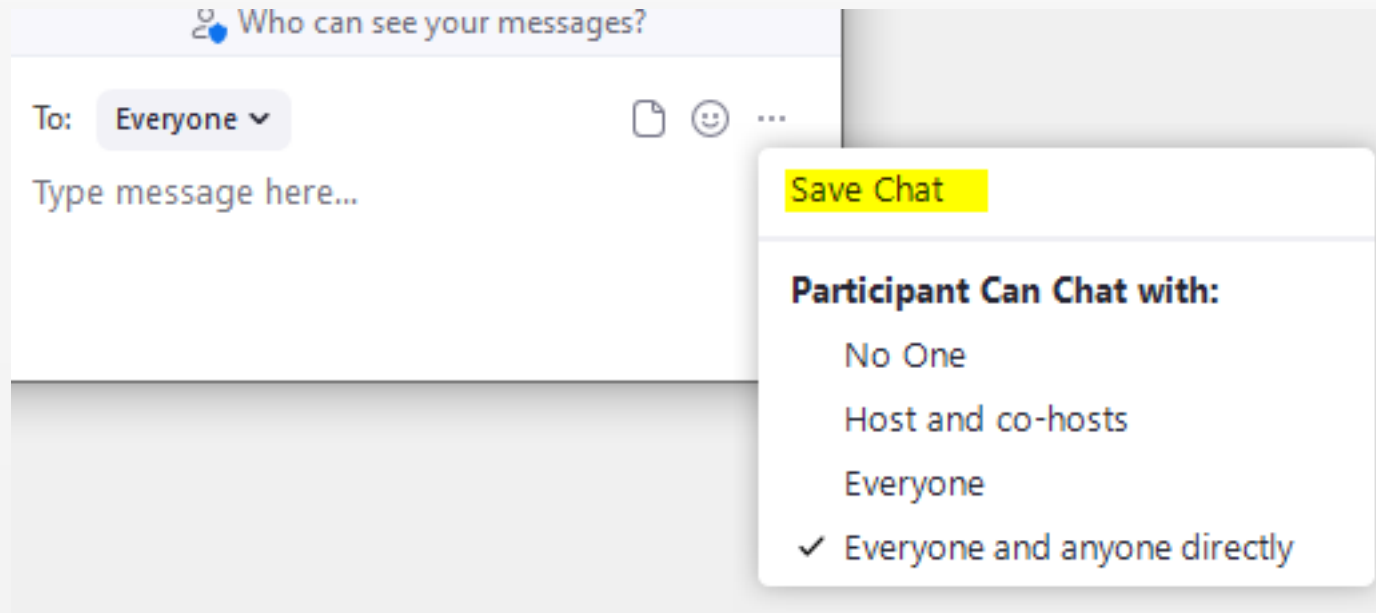


What's Next?

- Review Leadership Development Guide
- Participate in transition meeting with current and incoming officers
- Ensure current Secretary has submitted the 2022-2023 Election Report
- Verify your login access to Kiwanis Connect
- Set your goals for next administrative year



Save Chat Function





Kiwaniis[®]

**Kids Need
Kiwaniis
To Reach their
Potential!
KIWANIS NEEDS
MEMBERS LIKE
YOU!!**

THANK YOU!

COMPLETE SURVEY: <https://bit.ly/2022CLESurvey>

Closing Notes & Questions



Any questions contact:

Sarah Zulueta

Governor, 2021-2022

Email: zuluets@gmail.com

Mike Coolbaugh

Governor Elect, 2021-2022

Email: sgt283@comcast.net

