

2024 CLUB LEADERSHIP EDUCATION

Club Secretary

Michigan District
June 3, 2024



Agenda

1. Kiwanis 101
2. Club Secretary



Learning Outcomes

- Define your role.
- Articulate the responsibilities of your role.
- Explore how you can contribute to retaining members of your club.
- Recognize the importance of membership growth.
- Locate and use available resources.



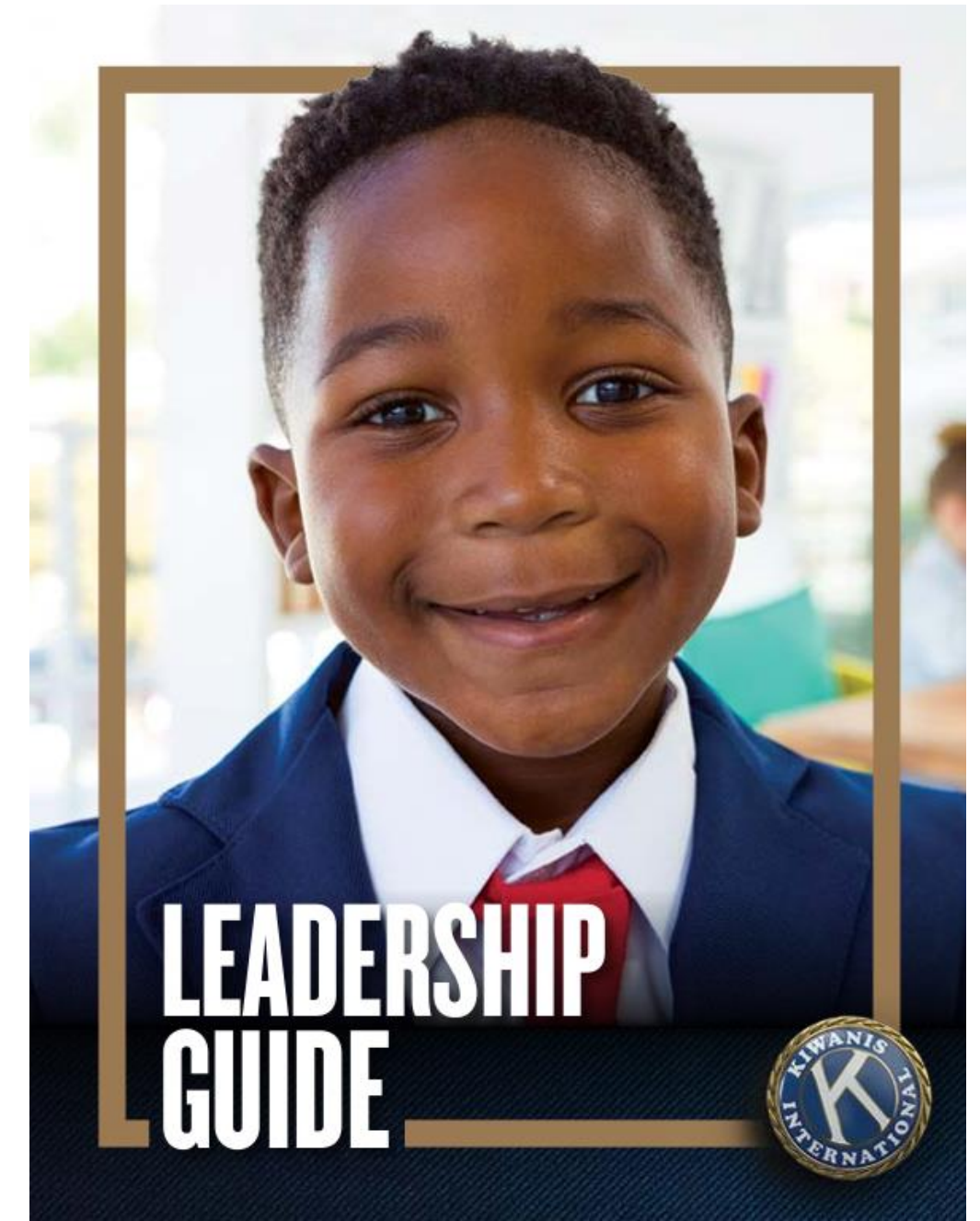
Materials

- Leadership Guide
- Annual Checklist (relevant to position)



You can access the Club Leadership Guide at www.kiwanis.org/leadershipguide

You can access the Achieving Club Excellence (ACE) Tools at www.kiwanis.org/acetools



Housekeeping Notes



- For attendance records, please put, in the CHAT BOX,
 - Your Name
 - Your Kiwanis Club Name
- This recording will be made available within 48 hours, and you will receive an email with the link to access the recording.
- We will submit your attendance to the Kiwanis International Dashboard to show you attended the training.

Parking Lot

- Questions during the presentation?
- Insights or examples to share?
- Something off-topic that you'd like to discuss?

Please put any questions in the chat box and we answer them as time permits.



KIWANIS 101

Organization basics

KIWANIS 101

- **MOTTO**

Serving the children of the world.

- **DEFINING STATEMENT**

Kiwanis is a global organization of volunteers dedicated to improving the world one child and one community at a time.

- **VISION STATEMENT**

Kiwanis will be a positive influence in communities worldwide...so that one day, all children will wake up in communities that believe in them, nurture them and provide the support they need to thrive.

KIWANIS LEADERSHIP STRUCTURE

Club



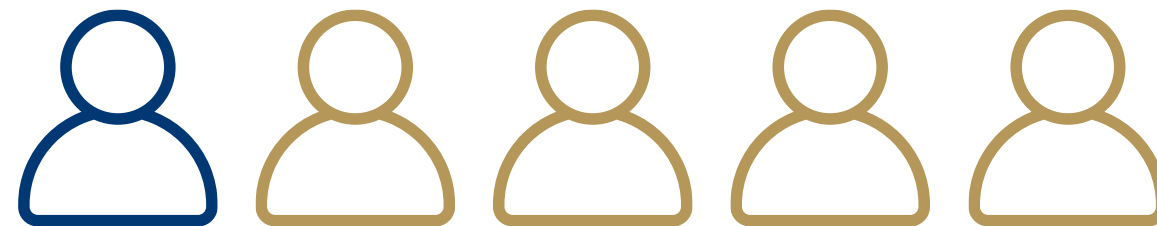
Club president, president-elect, secretary, treasurer, board of directors

Division



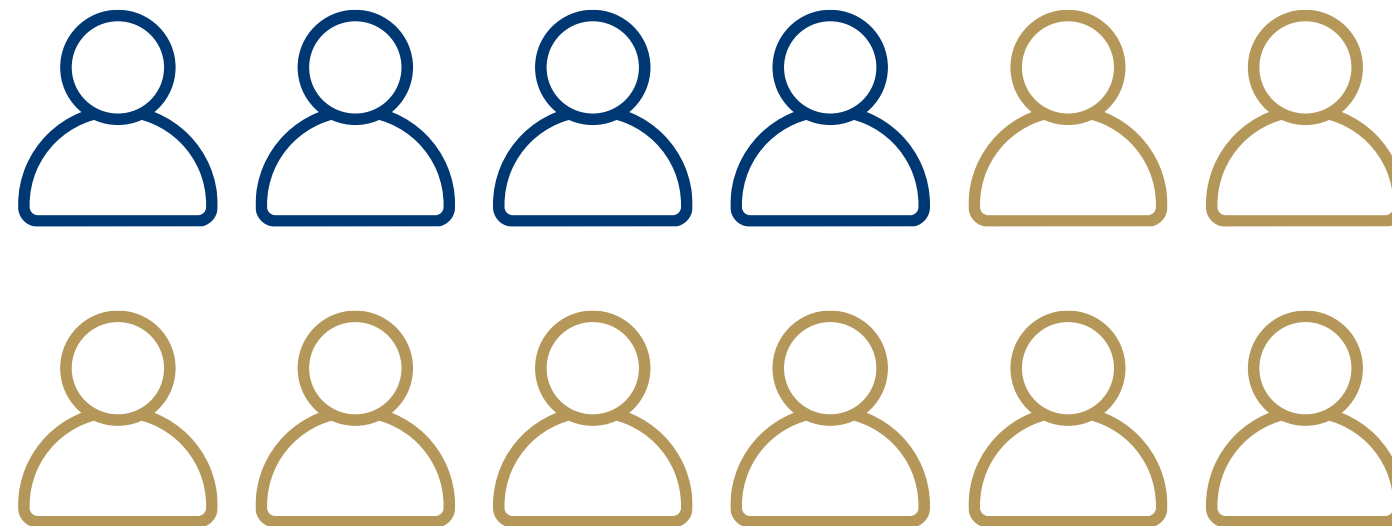
Lieutenant governor

District



District governor, governor-elect, secretary, treasurer, district chairs

Kiwanis International



President, president-elect, vice president, immediate past president, trustees

YOUR DISTRICT

- We are the Michigan District – the birthplace of Kiwanis
- The Michigan District is composed of the lower peninsula and 5 counties in the upper peninsula, right above the Mackinac Bridge
- There are 17 Divisions in the Michigan District

What division is your club located in?

WHO'S WHO

- District Governor: Rene Callery
- District Governor-Elect: Frank Palazzolo
- Executive Director (District Secretary/Treasurer): Greg Smith
- Administrative Secretary: Stacey Nill
- Lieutenant Governor(s): Do you know who your Lt. Governor is?

Who is the lieutenant governor for your division?

THE KIWANIS OBJECTS

In 2024 we celebrate the 100th anniversary of the adoption of the Kiwanis objects!

- To give primacy to the human and spiritual, rather than to the material values of life.
- To encourage the daily living of the Golden Rule in all human relationships.
- To promote the adoption and the application of higher social, business and professional standards.
- To develop, by precept and example, a more intelligent, aggressive and serviceable citizenship.
- To provide, through Kiwanis clubs, a practical means to form enduring friendships, to render altruistic service and to build better communities.
- To cooperate in creating and maintaining that sound public opinion and high idealism which make possible the increase of righteousness, justice, patriotism and goodwill.

What do the Kiwanis objects mean to you?

KIWANIS STRATEGIC PLAN

- **MEMBERSHIP AND ENGAGEMENT**

Build, retain and support Kiwanis membership network.

- **LEADERSHIP AND EDUCATION**

Develop competent, confident and caring leaders across the Kiwanis family.

- **COMMUNITY IMPACT**

Perform meaningful service, with service to children as our priority.

- **FINANCIAL VIABILITY**

Ensure financial viability and responsible stewardship.

- **BRANDING AND IMAGE**

Enhance the Kiwanis image and brand worldwide.

**How can you help your club
focus on the priorities laid
out by the strategic plan?**



ROLE AND RESPONSIBILITIES



Role

- Organizer.
- Record keeper.
- Board member.
- Communicator.

What qualities do you think make for a great club secretary?



Responsibilities

- Update online club and membership records.
- Maintain club's permanent files.
- Keep minutes for club and board meetings.
- Act as the official contact for all club mail correspondence.
- Collect communications and distribute.
- Submit all official reports.
- Other duties as assigned.

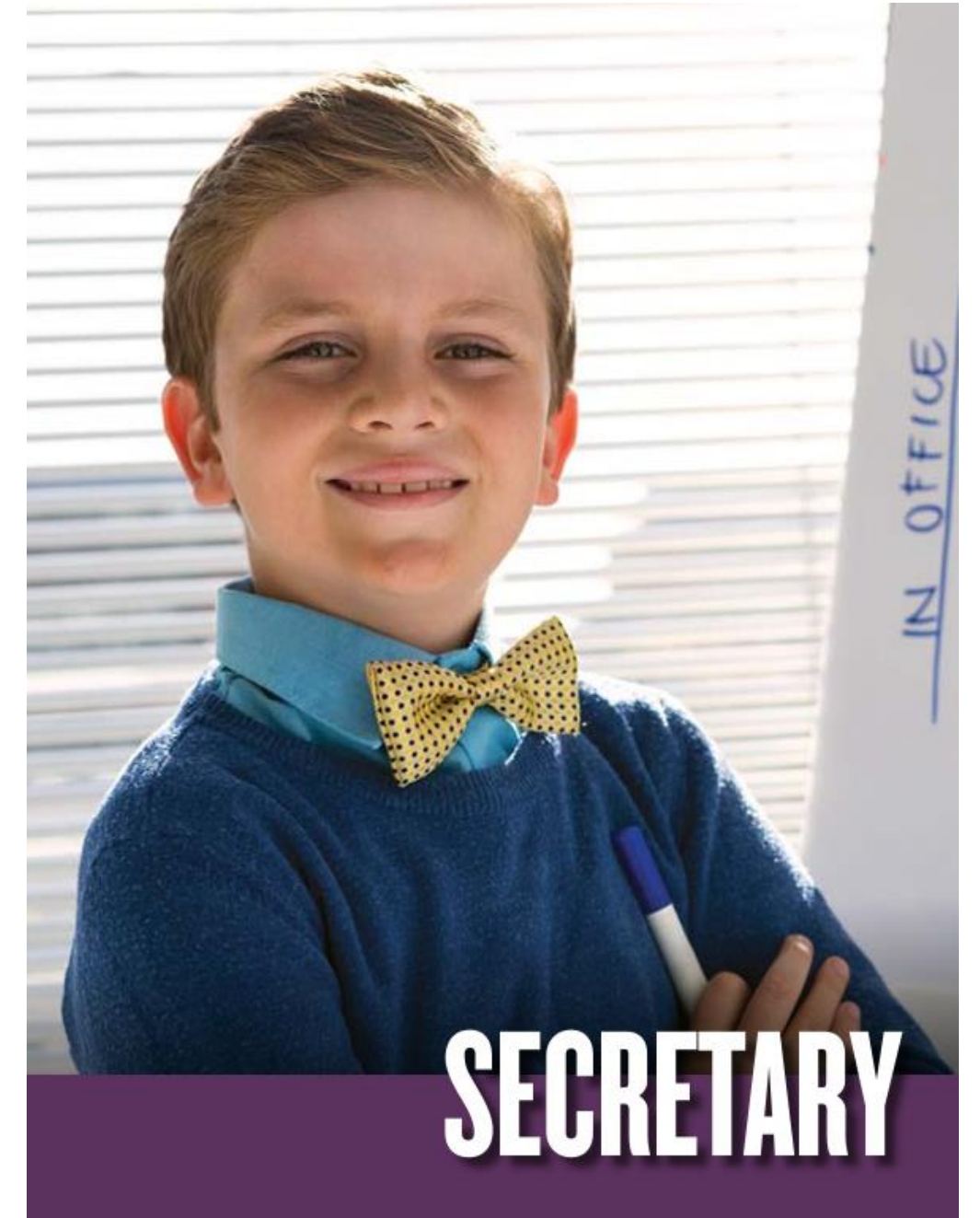


Lead by Example



KEY RESOURCES

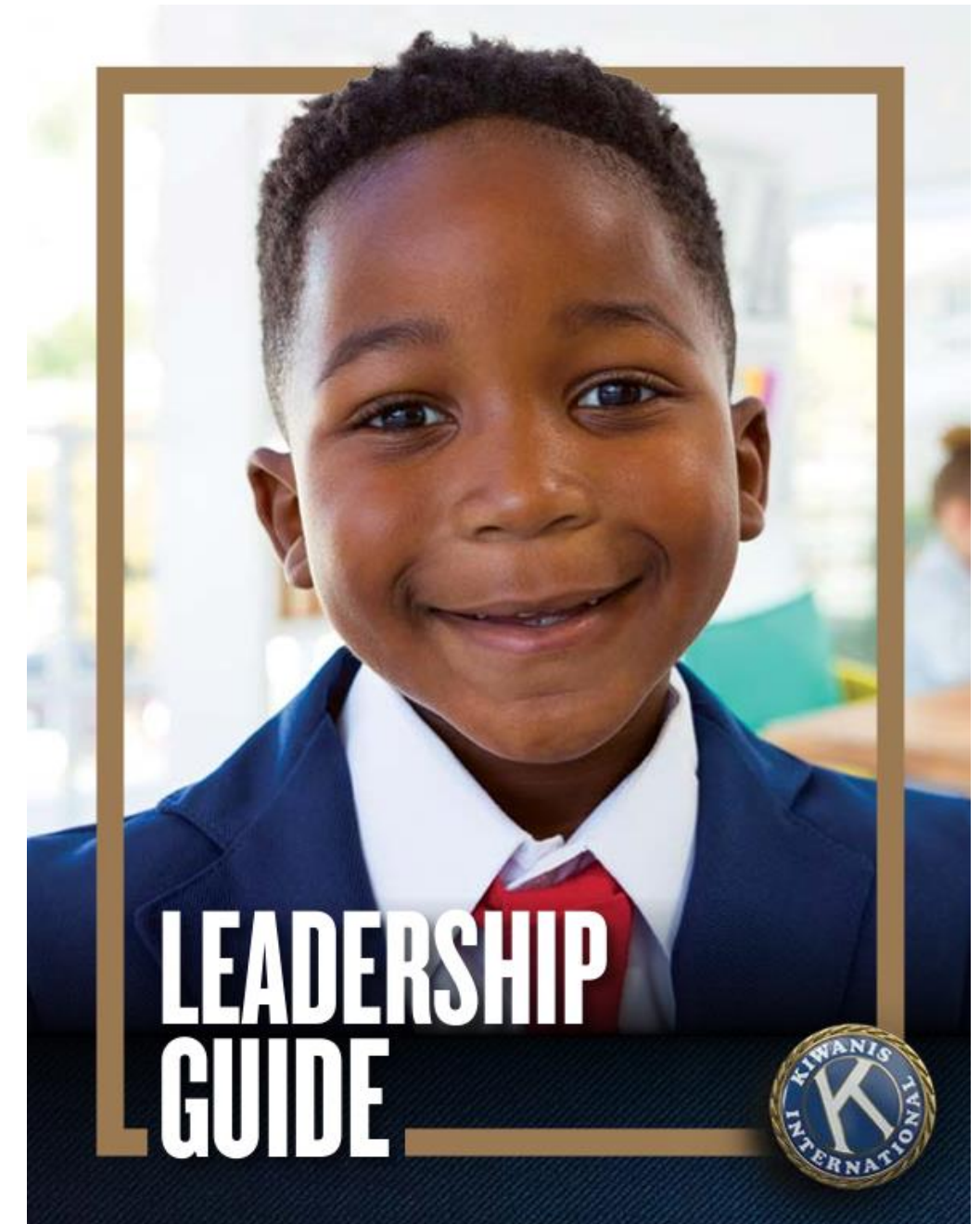
- Leadership Guide
- Club secretary website
- Club secretary annual checklist
- Youth protection guidelines



Leadership Guide

[Kiwanis.org/leadershipguide](https://www.kiwanis.org/leadershipguide)

- Kiwanis 101 information
- Club secretary section
- Club president, treasurer and membership chair sections
- Resources section



Club Secretary Website

[Kiwanis.org/clubsecretary](https://www.kiwanis.org/clubsecretary)

- Leadership Guide link
- Monthly checklist
- Distinguished criteria
- Club bylaws
- ACE Tools
- Background check information
- More



Club Secretary Annual Checklist

kiwanis.org/clubsecretary

- Important organizational dates.
- To-do items.
- Deadlines.
- Helpful tips.

CLUB SECRETARY ANNUAL CHECKLIST

JUNE-JULY 2024

Kiwanis International dates

- July 3 Kiwanis International Board meeting, Denver, Colorado, USA.
- July 3 Kiwanis Children's Fund Board meeting, Denver, Colorado, USA.
- July 3-6 Kiwanis International Convention, Denver, Colorado, USA.
- July 3-5 Circle K International Convention, Denver, Colorado, USA.
- July 4 Independence Day, Kiwanis International Office (Indianapolis, Indiana, USA) closed.
- July 10-14 Key Club International Convention, Atlanta, Georgia, USA.
- July Kiwanis Youth Programs Board meeting.
- July 21 National Day, Kiwanis International Office Ghent, Belgium) closed.

Checklist

- Make plans to attend your Kiwanis district convention. When you go, you'll have a chance to take part in club secretary education, improve your skills and meet Kiwanis members from your region.
- Review report forms, board meeting agendas/minutes and club procedures for carrying out your responsibilities. Check out the resources at kiwanis.org/clubsecretary.
- Meet with the current club secretary to discuss the position and facilitate a smooth transition.

AUGUST 2024

Kiwanis International dates

- August 15 Deadline to file Form 990 and Form 990-EZ extensions if needed.
- August 15 Assumption Day, Kiwanis International Office (Ghent, Belgium) closed.

Checklist

- Schedule an organizational board meeting and budget planning session with the incoming board and committee chairs by late September. Find a budget worksheet in the club secretary resources binder or at kiwanis.org/clubsecretary. Plan to adopt the club budget by October 1.
- Work with the incoming president to establish a mutually convenient time for a weekly discussion throughout the year for planning, problem solving and follow-up.

Youth Protection Guidelines

kiwanis.org/youthprotection

- Policies and procedures.
- Youth protection training.
- Background check information.
- Other resources.



REPORTING



Club Meetings



For each club meeting:

- Work with club president to develop agenda.
- Communicate with program committee chair regarding program information, meeting setup and greeters.
- Take attendance.
- Take minutes.

Monthly Board Meetings



For each board meeting:

- Work with club president to develop agenda.
- Send agenda, previous meeting's minutes and a meeting reminder to board members.
- Sort correspondence, bills, etc. for your report to the board.
- Take minutes.
- Collect information you will need for the monthly club report.



Kiwanis Online Reporting



Online access to:

- Compile, pull and submit club reports.
- View and edit Service Leadership Programs.
- Edit club, leadership and roster information.
- Submit convention voting delegate information.
- View and pay club dues.
- View member background check status information.

Club Information



Update and view:

- 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 and social media accounts).
- Club statistics.

Monthly Reports



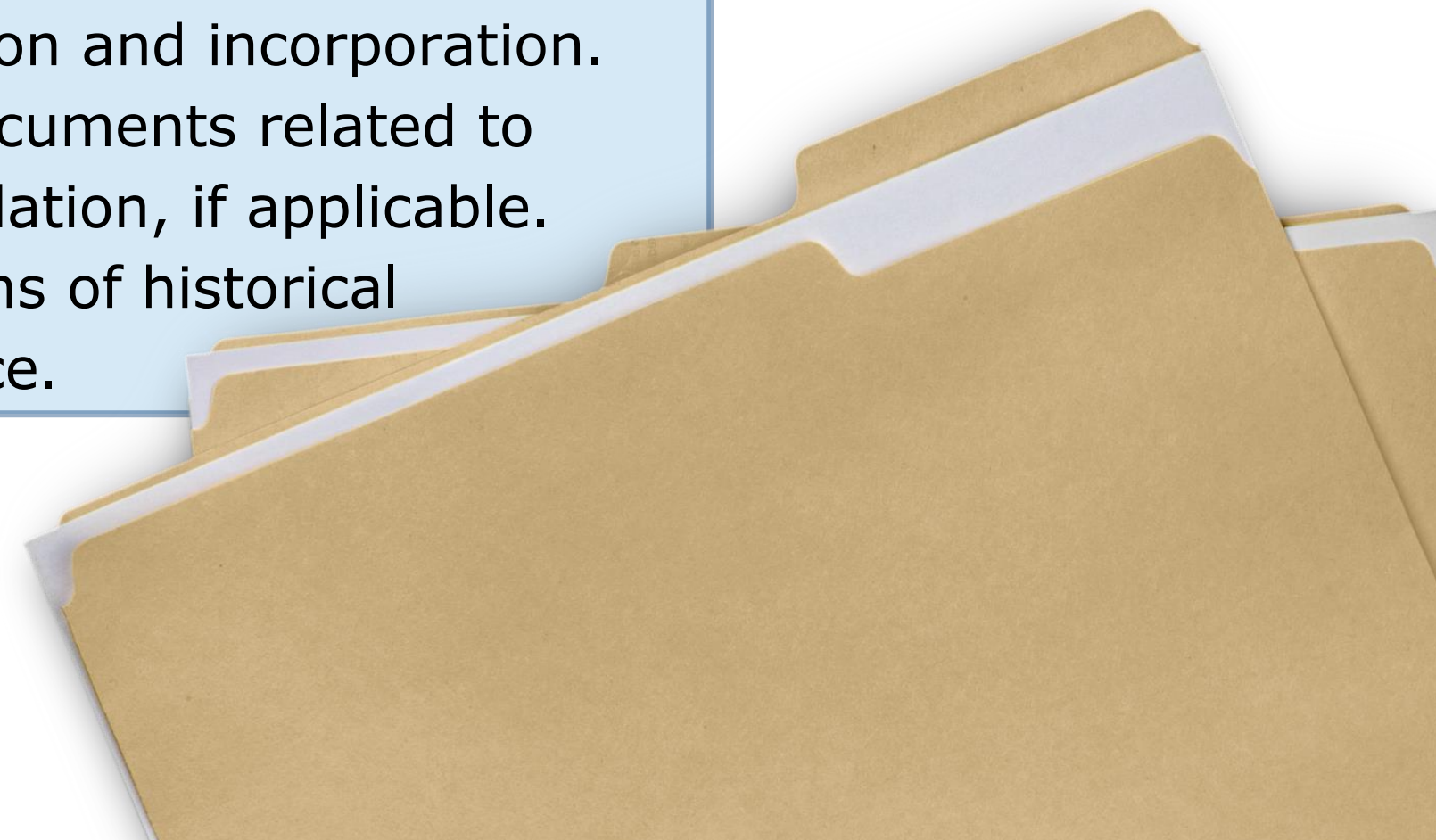
- Club meeting and attendance information.
- Service project and fundraising data.
- New partnership information.
- Donation/giving data.
- Monthly/annual administrative questions.

Permanent Files



- Board meeting minutes.
- Canceled checks (seven years).
- Club newsletters.
- Club meeting minutes.
- Financial records and reports.
- Background checks of Kiwanis advisors (seven years).
- Historic information/materials.
- Invoices.
- Lists of officers, directors and committees for each year.

- Recognitions such as:
 - Legion of Honor
 - Ruby K
 - Life member
 - Significant donations
- Official documents relate to club organization and incorporation.
- Official documents related to club foundation, if applicable.
- Other items of historical significance.



Club Bylaws

**Find the Standard Form for
Club Bylaws at
kiwanis.org/clubbylaws**



Member Information



- Edit member contact information.
- Add/assign leadership roles.
- Add new members.
- Delete members.
- Download current club roster.

kiwanis.org/login

Finances



- View and print invoices.
- Pay open invoices by credit card.
- Request invoice adjustments.

kiwanis.org/login



Required Forms



Monthly report form	Complete by the 10th of every month with the previous month's information.
Membership report for annual dues billing	Update your roster throughout the year, adding and deleting members as needed. Clubs have until October 10 to delete any members for which they should not be billed annual dues.
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



<p>Proposed amendments and resolutions to the Kiwanis International Bylaws</p>	<p>Submit your proposal in writing to the Kiwanis International Office by October 31 for consideration in the House of Delegates.</p>
<p>Delegate certification forms.</p>	<p>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 office or the district website to learn more.</p>

SCENARIOS



Scenario 1

Mail call!

In the mail, you receive a package from Kiwanis International addressed to you as club secretary. Inside you find a workbook for creating your club's membership plan, a program booklet for the upcoming Kiwanis International Convention, a flier for the new Kiwanis Children's Fund campaign - The Possibility Project and some additional organizational information.

What do you do with these materials?



Scenario 2

Guest of Honor



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?



THANK YOU

SUE PETRISIN

2015-16 President, Kiwanis International



517-256-7293 – if text, please provide name & Kiwanis Club



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