



**ELEVATE
OUR IMPACT**
2025 Capital District Mid-Year Conference

ELEVATING OUR SECRETARIES & TREASURERS

Capital District Midyear Conference

Jeffrey Wolff

March 1, 2025



Kiwanis Engage



Kiwanis Engage

- ✓ The Kiwanis family's new customer relationship management (CRM) and financial system.
- ✓ Engage is built on the industry-leading Salesforce platform.
- ✓ Members, leaders, and staff will all work in one ecosystem.

**Training in April 2025 (with sandbox)
Launching in late June/early July 2025**



Kiwanis Engage

DEMONSTRATION

<https://test-engage.kiwanis.org/>



Staying Organized



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.



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.



Common Club Administration Questions





Common Question #1

“Who has access to update club data online?”



Club dashboard user access:

- **Club president** (on Oct 1)
- **Club secretary** (on Oct 1)
- **Club assistant secretary** (on October 1)
- **Club treasurer** - Finances Only (on October 1)
- **Lieutenant Governor** (once reported)
- **Executive Director** (always)



Common Question #2

“What do my clubs pay when they submit a new member?”



Dues simplification facts:

- A simplified dues policy began on October 1, 2021.
- The flat new member fee was eliminated from Kiwanis International and all Kiwanis districts.
- Instead, a new or rejoining Kiwanis member is charged prorated dues and fees, based on the month they join.
- On each subsequent October 1 (the first day of the Kiwanis year), all members will then be assessed the annual dues-and-fees amount



Dues and fees:



Kiwanis International Dues: \$77 USD



Kiwanis magazine subscription: \$8 USD



General Liability insurance: \$18 USD



D&O insurance: \$4 USD



Capital District Dues: \$32 USD

TOTAL: \$139.00



Prorated dues for new members:

Dues and fees decrease by 1/12th each month

New Member Prorated Dues	Kiwanis International	Capital District	Total Dues
October	\$ 107.00	\$ 32.00	\$ 139.00
November	\$ 98.08	\$ 29.33	\$ 127.41
December	\$ 89.17	\$ 26.67	\$ 115.84
January	\$ 80.25	\$ 24.00	\$ 104.25
February	\$ 71.33	\$ 21.33	\$ 92.66
March	\$ 62.42	\$ 18.67	\$ 81.09
April	\$ 53.50	\$ 16.00	\$ 69.50
May	\$ 44.58	\$ 13.33	\$ 57.91
June	\$ 35.67	\$ 10.67	\$ 46.34
July	\$ 26.75	\$ 8.00	\$ 34.75
August	\$ 17.83	\$ 5.33	\$ 23.16
September	\$ 8.92	\$ 2.67	\$ 11.59



Common Question #3

“How much is Kiwanis life membership,
and how does it work?”



Kiwanis Life Membership:

- 15 x the current annual dues amount (US\$77) = \$1155.
- Once given life status, the member will not have to pay the annual dues portion in their primary club for the remainder of their time in Kiwanis (still pay magazine, insurance, and risk management).
- Only applies to their *primary* club (multi-club members).
- Life member application online at <https://bit.ly/3zYy3Rs>.



Capital Life Membership

- 15 x the current annual dues amount (US\$32) = \$480.
- Once given life status, the member will not have to pay the Capital District dues portion in their primary club for the remainder of their time in Kiwanis.
- Only applies to their *primary* club (multi-club members).
- Life member application online at district website.



Common Question #4

“How are club official year-end membership numbers calculated?”



Year-end membership figures include:

- Member additions received into the Kiwanis International office by 11:59 p.m. EST September 30th.
- Member deletions received into the Kiwanis International office by 11:59 p.m. EST October 10th.
- Year-end certified membership: net number as of October 10th (after all updates have been processed by KI) .



Common Question #5

“Who is required to have a background check?”



Background checks required:

- Kiwanis advisor to an SLP club.
- Chaperones: all adults working with youth (club members and non-members) participating in any single day off-school premises or overnight SLP sponsored event. Includes faculty advisors.
- District administrators/committee members.
- District Officers: Vice Governor, Governor-elect, Governor, Immediate Past Governor, Regional Trustees, Lt. Governors
- Kiwanis International Trustees/Officers.



Common Question #6

“What is the process to transfer a member to another club?”



Member Transfer:

- **2 steps**
- First: club that member is leaving should delete them from their roster.
- Second: once removed, club that the member is transferring into can add them, designating them as a “transfer”.
- If both steps are done within 6 months of each other, no additional fee is assessed.

Non-Traditional Membership Options





Corporate membership

- Company or organization is the member, with an individual as primary representative
- Club is billed the same amount as traditional members by KI
- Allows for “swapping out” the representative at no additional cost



Corporate membership

Types of individuals corporate membership can be a good fit for:

- Bank staff, organization representatives, and other positions that might see high transfer or turnover
- Faculty advisors – for your SLP!
- Others?



Satellite membership

- Members who can't attend a regular club meeting due to day or time, or location – but want to be a part of the club
- Those seeking different meeting dynamic



Satellite membership

- Governed by parent club bylaws, officers and directors
- May a meet at different time or location
- Pay dues through parent club
- May operate similar to a “committee”



Former SLP member

- Former member of a Service Leadership Program club (CK, KC, AK, BC, or KK)
- Joining their **first** Kiwanis club
- Exempt from paying KI dues and district dues – only pay for magazine, insurance and Risk Management fee (\$30) for first two years they would normally pay

Discussion Time!





**ELEVATE
OUR IMPACT**
2025 Capital District Mid-Year Conference

ELEVATING OUR SECRETARIES & TREASURERS

Capital District Midyear Conference

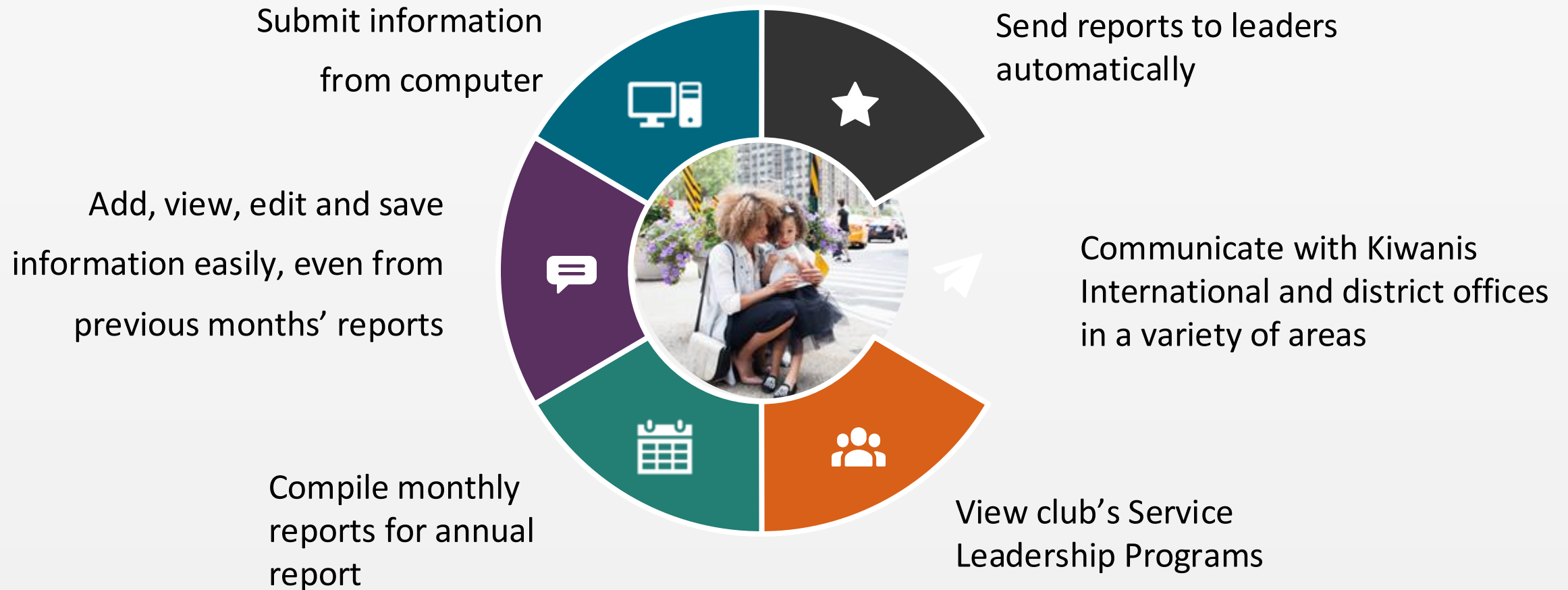
Jeffrey Wolff

March 1, 2025





Kiwanis Online Reporting



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



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



Monthly Reports

New this year:

- Custom questions asking about participating in monthly district service project themes



Year	Month	Text	Type	Category
2022 - 2023	October	How many hours did your club dedicate to the monthly district service theme?	Number	Meaningful service Service projects
2022 - 2023	October	If you participated in the monthly district service theme, what was your project?	Free text	Meaningful service Service projects



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





**ELEVATE
OUR IMPACT**
2025 Capital District Mid-Year Conference

ELEVATING OUR SECRETARIES & TREASURERS

Capital District Midyear Conference

Jeffrey Wolff

March 1, 2025

