



# Kiwanis®

## CAPITAL DISTRICT

Capital District, Kiwanis International  
2024-2025 Board of Trustees Meeting  
Friday, August 22, 2025 - 9:30am  
Hyatt Regency Crystal City - Arlington, VA

1. Welcome
2. Pledge of Allegiance
3. Recognition of Guests
4. Declaration of Quorum
5. Approval of Agenda
6. Approval of Minutes
  - a. May 17, 2025 - Board of Trustees Meeting
7. Matters for Approval and/or Discussion
  - a. Bylaws & Policies
    - i. Agenda Point - District Bylaws Revision 2025
    - ii. Agenda Point - District Policies Update for Convention
    - iii. Agenda Point - Past Lt. Governors Committee
    - iv. Agenda Point - Reimbursement Policy for Executive Director
  - b. Finance
    - i. Agenda Point - Approval of FY2024 Financial Review and 990
  - c. Executive
    - i. Agenda Point - Kiwanis Voices District Dues
8. Leadership Reports
  - a. Executive Directors Report
    - i. District Financial Standing / Overview of Monthly Reports
    - ii. Outstanding Dues / Club Election Reporting
    - iii. Club Building Status / Membership Totals / Charters In Danger
    - iv. Club Monthly Reports
    - v. Lt. Governor Elections
  - b. Regional Trustee Reports
  - c. Committee Reports
9. New Business
  - a. Final Report - Ad-Hoc Committee on Redivisioning
10. Adjournment



# Kiwanis®

## CAPITAL DISTRICT

Capital District, Kiwanis International  
2024-2025 Board of Trustees Meeting  
Saturday, May 17, 2025 - 10:01am  
Zoom Online Conference  
Official Minutes

Governor Hiscock called the meeting to order at 10:01 am.

Attendees: Governor Josh Hiscock, Governor-Elect Tim Gillette, Executive Director Jeffrey Wolff, Immediate Past Governor Eric Lamb

Trustees: Marie Quick, Jamie Moore, Nathaniel Kyle, Charles Marks, April Farmer

Absent Board Members: Trustee Roger Diehl

Guests: Editor John Montgomery, Division 15 Lt. Governor-Designate Clark Goodman, KCF Advocate PG John Tyner, DCON Chairperson Ronesha Prioleau

### **Approval of Agenda & Past Minutes**

Governor Hiscock announced that the board had a quorum to conduct business.

- Motion made by Trustee Bowe-Quick to approve the agenda of the May 17, 2025 Board of Trustees Meeting as published. ***Motion passed unanimously.***
- Motion made by Trustee Bowe-Quick to approve the minutes of the February 28, 2025 Board of Trustees Meeting. ***Motion passed unanimously.***

### **Items for Discussion and Board Action**

- PG John Tyner gave an update on the Possibility Project. We have raised \$550,000 in Capital so far. 6 Impact Clubs, 5 other clubs have had presentations.
- Motion made by Governor-Elect Gillette to approve the payment of a late expense report submission for \$435.90 by Past CKI DA Catie Dugan Vargas. ***Motion passed unanimously.***
- Executive Director Wolff provided a walk-through of the International Convention agenda and current Capital District registration.
- District Convention Chairperson Prioleau provided an update on the work of the DCON Committee to date. Registration will go live June 5, 2025.
- Governor Hiscock provided an update of the completion of the build of the new Kiwanis Club of Marshall County, WV. 6 more clubs are meant to be built this year. North Stafford, Laurel, East End, Easton are all in process and we are about to launch a build in Bel Air.
- **Trustee Reports were discussed.**
- **Committee Reports were discussed.**
- **Executive Director's Report was presented as published in the Board Book**

- Executive Director Wolff briefed the board on two actions of the Kiwanis International Board at their April meeting.
  - The creation of the five-year pilot program of Kiwanis Voices, a new Kiwanis club type for 18-26 year olds, with a flat \$40 dues structure.
  - The discussion and subsequent push to committee to discuss the restructuring of Circle K International.
- Executive Director Wolff briefed the board on the launch of Kiwanis Engage.

**With no further business before the Board of Trustees, Governor Hiscock adjourned the meeting of the 2024-2025 Capital District Board of Trustees at 11:42am.**

The next and final meeting of the 2024-2025 Capital District Kiwanis Board of Trustees will take place on August 22, 2025 at 9:30am ET in Crystal City, Virginia at the Capital District Kiwanis Convention.

Respectfully submitted,

A handwritten signature in cursive script that reads "Jeffrey Wolff". The signature is written in black ink and is positioned above the printed name and title.

PG Jeffrey M. Wolff  
Executive Director



**Kiwanis**  
CAPITAL DISTRICT

Capital District, Kiwanis International

August 2025 Board of Trustees Meeting

Agenda Point – District Bylaws Revision

### **Background**

In recent years, the Kiwanis International Board of Trustees and the House of Delegates have passed certain amendments to the Kiwanis International Policies and Bylaws, respectively, necessitating corresponding revisions in the Standard Form for District Bylaws. Per an amendment to the Kiwanis International Bylaws approved by the 2023 House of Delegates, candidates for the offices of governor, governor-elect and vice-governor shall have a satisfactory criminal history background check conducted and verified by Kiwanis International. In addition, to provide a more in-depth and encompassing definition of conduct unbecoming of a Kiwanian, the Kiwanis International Board has updated the definition in Kiwanis International Policy documents.

Article 3 §2, Article 7 §2(c), and Article 9 §2 in the Standard Form for District Bylaws were updated regarding these changes. The committee reviewed the language provided by Kiwanis International and prepared a revision to incorporate the required language into the District Bylaws while also extending the same requirement to Lieutenant Governors as well to maintain a consistent definition for all district offices.

### **Recommendation**

The Committee recommends that the Board of Trustees adopts the District Bylaws revision as attached. The Standard Form for District Bylaws is designed to reflect the basic requirements Kiwanis International has for Kiwanis district operations. Therefore, when changes are made to the Standard Form, districts must adopt them. **Districts may not reject those changes.**

Additions are in red and bolded, and deletions are struck through the document. Articles 3 and 9 are the only sections impacted by this change.

Article 13, Section 3 of our current district laws already provides the authority of the district board to adopt these changes required by Kiwanis International without submitting them to the House of Delegates for approval. Kiwanis International requested that we submit these changes at our next regularly scheduled meeting.

### **Operational Impact**

If approved by the Board, the Executive Director will modify and publish a revised district bylaws after receiving approval from Kiwanis International. The Executive Director will also report this change to the House of Delegates at the 2025 District Convention.

### **Financial Impact**

N/A

Respectfully submitted,

David Lurie  
Chair, Bylaws and Policy Committee



# BYLAWS OF THE CAPITAL DISTRICT OF KIWANIS INTERNATIONAL

ADAPTED FROM  
STANDARD FORM FOR DISTRICT BYLAWS  
As revised by the Kiwanis International Board  
January 2025

## ARTICLE 1. DEFINITIONS

**Section 1.** Wherever these terms appear throughout these bylaws, "**club**" means a club in good standing as defined from time to time by Kiwanis International and "**active member**" means a member in good standing with his/her club as defined by the club. However, provisions regarding sending notice to clubs about meetings, amendments, and resolutions and provisions regarding payment of club financial obligations shall apply to **all** chartered clubs, whether in good standing or not in good standing.

## ARTICLE 2. PURPOSE AND STRUCTURE

**Section 1.** The name of this organization shall be the Capital District of Kiwanis International.

**Section 2.** The boundaries of this district shall be as determined by the Kiwanis International Board; specifically Delaware; Maryland; the District of Columbia; West Virginia and Virginia, except the entire County of Lee, Virginia, and that portion of Wise County, Virginia, that composes the area of the Big Stone Gap, Virginia Kiwanis Club."

**Section 3.** Neither the district name nor boundaries shall be changed unless permissions shall first have been obtained from the Kiwanis International Board.

**Section 4.** The purpose of this district shall be primarily to help Kiwanis clubs and Kiwanis International advance the Objects, objectives, policies and strategic goals of Kiwanis, and specifically to cooperate with Kiwanis International in:

- Building new clubs and strengthening existing clubs;
- Delivering education to clubs; and
- Delivering service leadership programs and global campaign for children programming to and through clubs.

The purpose of the district also shall be to promote the interests of the clubs within the district to Kiwanis International.

### **Section 5.**

The district shall group clubs into divisions and divisions into regions. The boundaries of the divisions and regions shall be defined by the District Board in district policies.

**Section 6.** Each club\* within the district boundaries is a member of the district and is entitled to all the

rights, privileges, and responsibilities thereof.

### ARTICLE 3. OFFICERS

#### Section 1.

- a. The officers of the district shall be the Governor, Governor-elect, Vice Governor, Immediate Past Governor, Secretary-Treasurer, and a Lieutenant Governor for each division and a Trustee for each region of the district.
- b. No offices other than those of Secretary and Treasurer may be combined in one person.
- c. The Secretary-Treasurer has the title of Executive Director.
- d. After their election and before their assumption of office, all officers shall be known and designated by the titles of the offices to which they have respectively been elected followed by the term "designate."

#### Section 2. Each district officer shall be an active member\*\* in a club\* of the district.

- a. Each Lieutenant Governor shall be a member\*\* of a club\* in the division from which elected; shall have served as a Kiwanis club president; and shall have and maintain a satisfactory ~~clear~~ criminal history background check as provided in district policy. However, if there is no member\*\* from a club\* in a particular division qualified and willing to serve as lieutenant governor, a member\*\* of a club\* in another division may serve.
- b. Each Trustee shall be a member\*\* of a club\* in the region from which elected; shall have served as a Lieutenant Governor in this District; and shall have and maintain a satisfactory ~~clear~~ criminal history background check as provided in district policy.
- c. Each candidate for the office of Governor, Governor-elect and Vice Governor shall have and maintain a satisfactory ~~clear~~ criminal history background check conducted and verified by Kiwanis International; shall have been a member of a Kiwanis club in this district for at least six (6) years; and shall have completed a term as Lieutenant Governor in this district.
- d. The Executive Director shall have been a member of a Kiwanis club in the district for at least six (6) years; shall have served one full term as a Lieutenant Governor in this district; and shall have and maintain a satisfactory ~~clear~~ criminal history background check as provided in district policy.

#### Section 3. Officer terms shall be as follows. The terms of all district officers shall begin on October 1.

- a. Each Trustee shall serve for a term of three (3) years.
- b. All other officers shall serve a term of one (1) year, unless otherwise specified.

No person shall serve more than two consecutive terms as a Trustee or Lieutenant Governor. The time served by any person appointed by the District Board to fill a vacancy shall not count for the purpose of this provision.

#### Section 4. Each district officer has the duty and responsibility to:

- a.** Promote the Objects and objectives of Kiwanis International.
- b.** Promote the interests of the clubs within the district.
- c.** Perform such duties and responsibilities as are currently prescribed or as may be amended in the bylaws, policies, or procedures of Kiwanis International or of the district or as may be assigned by the District Board.
- d.** Actively promote implementation of growth efforts of the district in conjunction with Kiwanis International's strategic growth plan.
- e.** Actively promote and support programs of emphasis by Kiwanis International, such as the service leadership programs (where applicable) and the global campaign for children.
- f.** Attend all meetings required by the district.
- g.** Whenever possible, all district officers are encouraged to attend the Kiwanis International Convention.

**Section 5.** The Governor has the further duties and responsibilities:

- a.** Serve as the chief executive officer of the district, under the direction and supervision of the Kiwanis International Board of Trustees.
- b.** Be responsible for planning and developing the general program for the district convention and conferences with the advice and consent of the District Board.
- c.** Preside at all district conventions and meetings of the District Board.
- d.** Attend all conventions and other meetings required by Kiwanis International and the district's region.
- e.** Be responsible for implementing growth efforts of the district in conjunction with Kiwanis International's strategic growth plan.
- f.** (In districts where applicable) Actively promote the Service Leadership Programs of Kiwanis International and assure proper supervision of those programs on a local, divisional, and district level.

**Section 6.** The Governor-elect has the further duties and responsibilities:

- a.** Attend all meetings required by Kiwanis International and the district's region for Governors-elect, including the Governors-elect Education Conference and the International Convention.
- b.** Be responsible for the training of incoming Lieutenant Governors, Trustees, and district committee chairs; for implementing club education programs; and for education programs at the district convention.
- c.** Support the Governor.

**Section 7.** The Vice-Governor has the further duties and responsibilities to give priority to such training, orientation, and other activities that focus on education, leadership, and growth to prepare to later hold the offices of Governor-elect and Governor. This should include attending the training of incoming district officers.

**Section 8.** The Immediate Past Governor shall be a resource to the District Governor and District Board.

**Section 9.** The Executive Director has the further duties and responsibilities:

- a. Assist the Governor and District Board in conducting the business of the district.
- b. Keep all records of the district.
- c. Be the executive in charge of the District Office and, subject to the approval of the District Board, select the employees (if any).
- d. Submit to the proper officers, committees, or persons all communications received from Kiwanis International and cooperate with the Governor in forwarding all reports required by Kiwanis International.
- e. Attend and keep the minutes of the meetings of the District Board and the district conventions.
- f. Make a report to the district at its annual convention and such other reports as directed by the Governor or the District Board.
- g. Keep the financial accounts and records and be responsible for proper internal control procedures, including the receipt, deposit, and disbursement of district and sponsored organization funds in the manner authorized and prescribed by the District Board.
- h. Be a member of the Finance Committee.
- i. Regularly review and advise the District Board on the financial condition of the district and its financial accounts, records, and books of the district and its service leadership programs (if any).
- j. Make available for inspection by the Governor, the District Board, or any authorized parties, the financial accounts, records, and books of the district and its service leadership programs (if any).

**Section 10.** The Lieutenant Governors have the further duties and responsibilities:

- a. Provide support and assistance to the clubs in their division.
- b. Plan and preside at divisional meetings, under the direction of the District Board.
- c. Assist the Governor and the District Board in communicating and implementing the plans and goals of the district in their divisions.
- d. Report to the Governor about the condition and activities of clubs within their divisions.

- e. Visit each club in the division as many times as required by the district.
- f. While serving as Lieutenant Governor-elect shall assure training of the incoming club officers.

**Section 11.** The Trustees have the further duties and responsibilities:

- a. Perform the duties as a member of the District Board.
- b. Provide support to the Lieutenant Governors in their region.
- c. Plan and preside at regional meetings, under the direction of the District Board.

#### **ARTICLE 4. DISTRICT BOARD**

**Section 1.** The District Board shall consist of the Governor, Governor-elect, Vice Governor, Immediate Past Governor, Executive Director, and a Trustee for each region. The Executive Director shall be without vote.

**Section 2.** The management and control of the affairs of the district not otherwise provided for in these bylaws shall be vested in the District Board, subject to the supervision and control of the Kiwanis International Board of Trustees. The District Board may adopt policies and/or procedures, provided they are not in violation of any applicable laws or any higher governing documents.

**Section 3.** The District Board shall hold at least two (2) regular meetings during each administrative year, one of which shall be held prior to October 31, at such times and places as designated by the Governor. If the first meeting is held prior to October 1, any action taken shall become effective on October 1, unless a later date is specified.

**Section 4.** A special meeting of the District Board may be called by the Governor or two-thirds (2/3) of the entire Board.

**Section 5.** Subject to the laws of local jurisdiction, the District Board may meet and conduct business by any method that allows all participants to simultaneously communicate with one another or as otherwise allowed by law. Participation by such methods constitutes attendance. Normal board meeting rules and processes apply unless otherwise determined by the Board.

**Section 6.** The Executive Director shall notify each member of the District Board and the Executive Director of Kiwanis International of the time, place, and date of any regular meeting at least three (3) weeks in advance and of any special meeting at least three (3) days in advance.

**Section 7.** In the absence of the Governor from a meeting, the District Board shall elect one of its members to act as presiding officer.

**Section 8.** A majority of the total members of the District Board constitutes a quorum, and a majority vote of those present and voting is required for all business unless otherwise provided in these bylaws.

**Section 9.** Within thirty (30) days after any District Board meeting, the Executive Director shall provide a draft of the meeting minutes or a summary of the actions taken to Kiwanis International, and a copy shall be made available to clubs in the district. The district shall provide a copy of the official minutes

of each board meeting to Kiwanis International within thirty (30) days after approval by the District Board.

## ARTICLE 5. COMMITTEES

**Section 1.** The titles, structure, and duties of district standing committees, key positions, and Service Leadership Program administrators shall be those defined by the Kiwanis International Board.

**Section 2.** Each standing committee shall cooperate with the appropriate committee of Kiwanis International.

**Section 3.** The Governor may create special committees, subject to the approval of the District Board.

**Section 4.** The Governor shall appoint all committee chairs and members, subject to the approval of the District Board.

**Section 5:** The Governor shall be a non-voting member of all standing and special committees of the district.

**Section 6.** All committee members appointed by the Governor shall be subject to removal by the Governor.

## ARTICLE 6. CONVENTIONS

**Section 1.** The annual convention of the district shall be held at such place and date, between March 15 and September 25, as shall be mutually agreed upon by the District Board and the Kiwanis International Board, except that no district convention shall be held within the period of thirty (30) days prior to, during, or thirty (30) days following the Convention of Kiwanis International or its region (if any) unless approved by the Kiwanis International Board. In the event the annual convention of Kiwanis International is held within the geographic boundaries of a district, the district may hold its convention in conjunction with the Kiwanis International convention; in such cases, district functions may not be held during general sessions of the International Convention.

**Section 2.** Special conventions of the district shall be called by the Governor upon the request of a majority of the clubs\* or upon the request of three-fourths (3/4) of the members of the District Board.

**Section 3.** The Executive Director shall notify each club and the Executive Director of Kiwanis International at least sixty (60) days prior to the date of the annual convention and at least thirty (30) days prior to the date of any special convention or rescheduled annual convention.

**Section 4.** The District Board shall have full supervision and management of all conventions.

**Section 5.** For each convention, the Governor shall appoint a Committee on Credentials and a Committee on Elections, each to consist of at least three (3) members. All members of the Committee on Elections shall be delegates.

**Section 6.** At any district convention, each club\* shall be entitled to seat up to three (3) delegates, two of whom should be the club president and president-designate and may nominate up to three (3) alternates to serve if any delegate is absent. Club delegates and alternates shall be active members\*\*

of the clubs\* they represent. However, the Lieutenant Governor or a past Lieutenant Governor may represent any club\* in their division not otherwise represented by three delegates. Delegates shall be elected by each club prior to the convention and certified to the district by the club president and secretary. A current or past Lieutenant Governor representing a club may be certified by the Credentials Committee or its designee.

**Section 7.** Official delegates of a newly organized club shall be granted full privileges at district conventions after the charter has been approved by the Kiwanis International Board of Trustees, even if it has not been formally presented to such club.

**Section 8.** All officers and past Governors of the district who are active members\*\* of a club\* in the district shall be delegates-at-large to all district conventions.

**Section 9:** To be accredited, a delegate must have paid a convention registration fee if such is required.

**Section 10.** There shall be no voting by proxy or absentee ballot.

**Section 11.** The District Board may establish registration fees to be paid by persons attending any district convention. The proceeds derived from such registration fees shall be expended solely upon approval of the District Board.

**Section 12.** The convention may propose, discuss, and adopt resolutions, and may recommend matters or concerns to Kiwanis International. The convention shall also consider and act upon matters submitted to it by Kiwanis International.

**Section 13.** In the absence of the Governor from any convention of the district, the District Board shall designate any elected member of the District Board to act as presiding officer.

**Section 14.** Delegates from at least one-third (1/3) of the district clubs\* shall constitute a quorum at any district convention, and no less than a majority vote of the delegates present, and voting is required to approve all business unless otherwise provided in these bylaws.

**Section 15.** Within thirty (30) days after any convention, the Executive Director shall provide a written report of the actions taken, approved by the Governor, and shall transmit the report to the Executive Director of Kiwanis International. A copy of the report shall be made available to clubs in the district.

**Section 16.** In the event the District Board shall determine by resolution that there exists a condition of emergency that compels cancellation of the annual district convention, the Board shall notify Kiwanis International and district clubs immediately and shall determine one of the following methods to transact any and all business that was to be transacted at the annual convention, as soon as practical. The preference will be to reschedule the convention, if possible, or, alternatively, to call a meeting of all persons having the status of delegates-at-large at district conventions, a quorum of which shall be a majority.

**Section 17.** The official program of a convention as approved by the District Board shall be the order of the day for all sessions. Changes in the agenda of the House of Delegates may be made from time to time by a majority vote of the house.

**Section 18.** Resolutions

- a. A club\*, by majority vote of its active members\*\* or board, may propose resolutions to be considered at any convention of the district, provided they are submitted to the Executive Director not less than sixty (60) days prior to the date of the convention. Resolutions may also be proposed by the District Board.
- b. All proposed resolutions shall be referred to the Committee on Resolutions and Bylaws for its consideration and recommendation to the District Board. The Committee may modify, combine, edit, or not accept any club proposals. The District Board shall have final authority on resolutions to be considered at the convention.
- c. No later than thirty (30) days prior to the district convention, the Executive Director shall make available to each club in the district a copy of all proposed resolutions other than those of memoriam and appreciation.
- d. No other resolutions shall be considered unless approved for consideration by two-thirds (2/3) vote of the District Board and presented no later than the beginning of the House of Delegates.
- e. Resolutions may be adopted by a majority of the valid votes cast by the delegates present and voting, except those recommended by the Board less than sixty (60) days in advance which shall require two-thirds (2/3) vote to adopt.

**Section 19.** The House of Delegates shall adopt standing rules to conduct business.

## **ARTICLE 7. NOMINATION AND ELECTION OF OFFICERS**

**Section 1.** The election of officers, except as otherwise provided in these bylaws, shall be held at the annual convention. The official program of the convention shall indicate the time and place of the elections.

**Section 2.** The Executive Director who will assume office on October 1 shall be appointed by the Governor-designate, subject to the approval of the District Board-designate.

**Section 3.** The nominating and election procedure for officers to be elected at the annual convention shall be as follows:

- a. The Governor-elect shall be the sole candidate for the office of Governor and the Vice-Governor shall be the sole candidate for the office of Governor-elect. However, in any year in which the Governor-elect or Vice Governor was not previously elected by the district house of delegates or is no longer qualified to hold office, other qualified candidates shall be permitted.
- b. All qualified candidates for offices to be elected at the annual convention must submit written notice of candidacy to the Executive Director no later than the beginning of the first convention session.
- c. Qualified candidates for Governor, Governor-elect and Vice Governor shall:
  - Submit a signed agreement provided by Kiwanis International to fulfill the duties of office.
  - Have a ~~satisfactory clear~~ criminal history background check conducted and verified by Kiwanis International.



- d.** Prior to elections, the Executive Director shall report the qualified candidates to the House of Delegates.
- e.** A majority of all valid votes cast shall be necessary for each office elected at the convention. In the event that no nominee receives a majority of valid votes cast, a new election shall take place immediately, with the nominee receiving the fewest number of votes eliminated from the ballot. This procedure shall be followed until one nominee receives a majority vote.
- f.** The voting shall be by ballot only where there are two (2) or more candidates for the same office.
- g.** Cumulative voting shall not be permitted.

#### **Section 4. Duties of Credentials Committee and Elections Committee**

- a.** The Credentials Committee shall verify all delegates and determine the seating of any delegates not previously certified by their club. Prior to the elections taking place, the Credentials Committee shall report the delegate count to the Executive Director and Elections Committee, and shall make available to them, upon request, a list of the delegates.
- b.** The Elections Committee shall have general charge of the election and of distributing and counting all ballots. The Elections Committee shall report promptly to the convention the results of all balloting. The report shall be signed by a majority of the committee.

#### **Section 5. Election of Lieutenant Governor and Lieutenant Governor-elect**

- a.** The Lieutenant Governor of each division shall hold, not earlier than the first week of the administrative year and not later than the annual district convention preceding the expiration of the Lieutenant Governor's term, a meeting to elect a Lieutenant Governor and a Lieutenant Governor-elect for the next term. The time and place of this meeting shall be designated by the Lieutenant Governor. The president of each club in the division shall be notified at least 10 days prior to the meeting.
- b.** Each club\* in the division is entitled to seat up to three (3) delegates, two (2) of whom should be the club president and president-designate, as well as nominate up to three (3) alternates who may serve if any delegate is absent. All club delegates and alternates shall be active members\*\*.
- c.** Past Governors, current and past Trustees, and past Lieutenant Governors who are active members\*\* of a club\* in the division, as well as non-delegate club members\*\*, shall also be invited to the meeting and shall be allowed to participate in discussion, but shall not have voting rights.
- d.** Delegates from at least one-third of the clubs\* in the division shall constitute a quorum.
- e.** The Lieutenant Governor shall conduct the elections unless he/she is a candidate for election. If the presiding officer is absent or ineligible to serve, the meeting shall elect a delegate to conduct the elections.
- f.** No person shall be considered a candidate for Lieutenant Governor or Lieutenant Governor-elect without first providing consent and an agreement to carry out the duties and responsibilities

of office.

**g.** The Lieutenant Governor-elect shall be the sole candidate for the office of Lieutenant Governor. However, in any year in which the Lieutenant Governor-elect was not previously elected by the division or is no longer qualified to hold the office other qualified candidates shall be permitted.

**h.** Voting shall be by ballot only where there are two (2) or more candidates for the same position. A majority of all valid votes cast shall be necessary for elections. In the event that no nominee receives a majority of valid votes cast, a new election shall take place immediately, with the nominee receiving the fewest number of votes eliminated from the ballot. This procedure shall be followed until one nominee receives a majority vote. In the event of a tie vote, the Lieutenant Governor shall be entitled to vote.

**i.** The presiding officer shall report the election results immediately to the Executive Director who shall report the results to Kiwanis International.

**j.** A Lieutenant Governor-elect is not a district officer.

## **Section 6. Election of Trustees.**

**a.** The Trustee of each region shall hold, not earlier than the first week of the administrative year and not later than the annual district convention preceding the expiration of the Trustee's term, a meeting to elect a new Trustee for the next term. The time and place of this meeting shall be designated by the Trustee. The president of each club in the region shall be notified at least thirty (30) days prior to the meeting.

**b.** Each club in the region is entitled to seat up to three (3) delegates, two (2) of whom should be the club president and president-designate, as well as nominate up to three alternates who may serve if any delegate is absent. All club delegates and alternates shall be active members\*\*.

**c.** Past Governors, current and past Trustees, and past Lieutenant Governors who are active members\*\* of a club\* in the region, as well as non-delegate club members\*\*, shall also be invited to the meeting and shall be allowed to participate in discussion, but shall not have voting rights.

**d.** Delegates from at least one-third (1/3) of the clubs in the region shall constitute a quorum.

**e.** The current Trustee shall conduct the elections unless he/she is a candidate for election. If the current Trustee is absent or ineligible to serve, the most recent past Trustee present and willing shall serve, or in the absence of a past Trustee, the meeting shall elect a delegate to conduct the elections.

**f.** No person shall be considered a candidate for Trustee without first providing written consent and an agreement to carry out the duties and responsibilities of office. .

**g.** Voting shall be by ballot only where there are two (2) or more candidates for the same position. A majority of all valid votes cast shall be necessary for elections. In the event that no nominee receives a majority of valid votes cast, a new election shall take place immediately, with the nominee receiving the fewest number of votes eliminated from the ballot. This procedure shall be followed until one nominee receives a majority vote. In the event of a tie vote, the presiding

officer shall be entitled to vote.

- h.** The presiding officer shall report the election results immediately to the Executive Director who shall report the results to Kiwanis International.

## **ARTICLE 8. VACANCIES IN OFFICE**

**Section 1.** In the event of a vacancy in the office of Governor, Governor-elect, or Vice Governor, the vacancy for the unexpired term shall be filled by majority vote of the District Board from among the qualified past Governors, current or past Lieutenant Governors, or current or past Trustees.

**Section 2.** In the event of a vacancy in the office of Immediate Past Governor, the qualified member\*\* who served as Governor most recently prior to the Immediate Past Governor who is willing and able shall automatically become the Immediate Past Governor.

**Section 3.** In the event of a vacancy in the office of Executive Director, the Governor shall appoint a qualified member\*\* of a club\* of the district to fill the office for the unexpired term, subject to the approval of the District Board.

**Section 4.** In the event of a vacancy in the office of Lieutenant Governor or Trustee, the vacancy shall be filled as follows:

- a.** If the term has one year or less remaining, a qualified member\*\* shall be elected by a majority vote of the District Board to serve the remaining term;
- b.** If the term has more than one year remaining, the district shall notify the clubs in the affected division or region that a replacement Lieutenant Governor or Trustee may be elected at a division or regional meeting to be held within sixty (60) days from the date of such vacancy. In the absence of a replacement being elected by the division or region, a qualified member\*\* shall be elected by a majority vote of the District Board.

**Section 5.** In the event that the election of any district office cannot be completed for any reason, the District Board may consider the office to be vacant and may fill it as a vacancy as provided in these bylaws for such office.

**Section 6.** In the event that after election and before October 1, any district officer-designate is unable to serve for the year elected, the District Board-designate for said year shall fill the position as a vacancy as provided in these bylaws for such office. The disability or inability of a Governor-designate to serve for the year for which elected shall first be determined by a two-thirds (2/3) vote of the entire District Board-designate.

**Section 7.** In the event that the Governor is temporarily incapacitated and is unable to discharge the duties of office, as determined by two-thirds (2/3) vote of the entire district board, the District Board shall elect, by a majority vote, a qualified past Governor, current or past Trustee, or current or past Lieutenant Governor to become Acting Governor until the Governor is able to resume the duties of office. While the Governor is incapacitated, the Acting Governor shall have all the duties, responsibilities, and authority given to the Governor by these bylaws and the Bylaws of Kiwanis International. If, after a period of sixty (60) days, the district board determines by another two-thirds

(2/3) vote of the entire board that the Governor continues to be incapacitated and is not able to resume the duties and responsibilities of office, the Board may declare the office of Governor vacant and the vacancy shall be filled in accordance with the provisions for filling vacancies in such office as provided in these bylaws.

## ARTICLE 9. DISCIPLINE OF OFFICERS

**Section 1.** If a district officer is alleged by the Governor or two-thirds (2/3) of the District Board to be failing to perform his/her duties, the District Board shall investigate the allegation and determine the matter at a meeting held within forty-five (45) days after the investigation is complete or as soon as reasonably possible. Written notice of the allegation, investigation, and meeting shall be given to the accused officer at least thirty (30) days prior to the meeting. The accused officer shall be permitted to attend the meeting and present a defense. If the allegation(s) is sustained by no less than a two-third (2/3) vote of the entire board, the office shall be declared vacant.

### Section 2.

a. "Conduct unbecoming a member of the Kiwanis family" is defined in Kiwanis International Policy as any conduct that:

- Constitutes harassment of another individual based on race, color, creed, national origin, age, or sex, including sexual orientation and gender identity; or
- Constitutes a criminal act that is clearly incompatible with the best interests of the public or of members of the Kiwanis family; or
- Constitutes repeated offensive or obnoxious behavior at Kiwanis events and activities as determined by at least two-thirds (2/3) of the board of directors of a club or district as it relates to conduct unbecoming charges at the club or district level.
- ~~is incompatible with the best interests of the public or of members of the Kiwanis family; or~~
- ~~tends to harm the standing of Kiwanis in the local or global community.~~

b. If an allegation of 'conduct unbecoming a member of the Kiwanis family' is made against a district officer, allegedly committed while he/she was engaged in his/her duties as a district officer, the Governor shall immediately request from Kiwanis International a copy of the detailed procedures to be followed by the district and shall appoint a special investigator to investigate the matter. If an allegation is made against the Governor, the Immediate Past Governor shall fulfill the Governor's role throughout the process. If the investigation report concludes there is a reasonable basis for the allegation, the Governor shall notify the accused officer and refer the matter to the District Board to conduct a hearing to decide the matter. The Board shall then meet and report its decision whether the accused officer did or did not engage in 'conduct unbecoming,' and, based on that decision, the appropriate disciplinary action, as follows: counseling, a verbal or written reprimand, or suspension or removal from office.

c. If either the accused officer or the Investigator believes some part of the investigation was faulty or the determination was incorrect, either party has the right to request in writing reconsideration by the Board. The Board's decision on the matter shall be final.

d. If, at any point during the 'conduct unbecoming' process, possible criminal wrongdoing is discovered, the matter shall be reported to the proper authorities.

e. All materials, facts, and information related to the investigation, determination, and

reconsideration (if any) shall be kept confidential at all times by any parties or persons involved in any part of the process.

f. The district shall retain all official records on the matter (Allegation Report, Investigation Report, Hearing Record, Board Report, and Reconsideration Record if any) in a confidential file as long as required by applicable law, and shall send a copy to Kiwanis International, to be retained in a confidential file.

**Section 3.** If the district employs the Executive Director, or other district officers, the employment relationship supersedes the officer relationship.

**Section 4.** Whenever a district officer is removed from office for reasons involving conduct unbecoming a member of the Kiwanis family or failure to perform the duties of office or resigns from office, that person may be declared by the District Board to be ineligible to hold a district office or appointment in the future.

## ARTICLE 10. REVENUE

**Section 1.** Each club shall pay dues to the district for each active club member in an amount determined by a two-thirds (2/3) vote of the district House of Delegates. Dues shall be based on each club's annual membership report to Kiwanis International as of September 30 of each year and shall be due annually on October 1 and payable by November 30.

**Section 2.** If a Kiwanis club member was a former member of a Kiwanis International Service Leadership Programs club, the member's club is not obligated to pay district dues for any such club member for a period of two (2) administrative years from the date of joining their first Kiwanis club.

**Section 3.** District dues shall be charged for each new member of a club on the same basis used by Kiwanis International. District dues are waived for any new member who was a former member of a Kiwanis International Service Leadership Program club, upon joining their first Kiwanis club.

**Section 4.** The District Board may establish registration fees for district conferences or other meetings.

**Section 5.** No financial obligation shall be placed upon clubs of the district other than those provided in these bylaws or adopted by a two-thirds (2/3) vote of the House of Delegates.

## ARTICLE 11. FINANCE

**Section 1.** Not later than October 31, the District Board shall approve a budget of estimated revenues and expenses for the year, including capital expenditures.

**Section 2.** The financial records of the district shall be examined at the end of each fiscal year by a qualified individual(s) or company selected by the District Board in accordance with Kiwanis International standards. The individual(s) should be qualified to perform such work in their respective jurisdiction. A copy of the annual financial examination shall be sent to the Executive Director of Kiwanis International by March 31 and to the District Board and shall be made available to clubs and

members in the district.

**Section 3.** The District Board shall determine the official depository or depositories and shall designate persons authorized to disburse funds.

**Section 4.** The district will comply with all governmental reporting requirements for finances, taxation, employment, and any other areas of *operation*.

**Section 5.** The district shall report its financial status annually to clubs and to the Kiwanis International Board and at such other times and including such information as requested by the Kiwanis International Board.

## ARTICLE 12. OTHER AUTHORITIES

**Section 1.** This district bylaws and policies will comply with all applicable laws in its local jurisdiction(s).

**Section 2.** For authority on all matters not covered by these bylaws, the following documents will apply, in this order of priority:

**First**—Kiwanis International Bylaws

**Second**—Kiwanis International Policies and Procedures

**Third**—The bylaws of the district's region (if any)

**Fourth**—District Policies or Procedures

**Fifth**—Robert's Rules of Order Newly Revised (latest edition)

## ARTICLE 13. AMENDMENTS

### Section 1.

**a.** A club\*, by majority vote of its active members\*\*, may propose bylaw amendments to be considered at any convention of the district, provided they are submitted to the Executive Director not less than sixty (60) days prior to the date of the convention. Bylaw amendments may also be proposed by the District Board.

**b.** No later than thirty (30) days prior to the district convention, the Executive Director shall make available to each club in the district a copy of all proposed bylaw amendments.

**c.** Amendments to these bylaws may be adopted by two-thirds (2/3) of the valid votes cast by the delegates present and voting.

**Section 2.** These bylaws and any amendments to them shall be in conformity with the Kiwanis International Bylaws, and the Standard Form for District Bylaws. Amendments previously verified by Kiwanis International to be in conformity may become effective immediately, unless a later effective date is specified upon adoption. Any amendments not in conformity shall not be effective until or unless approved by the Kiwanis International Board. Any questions regarding conformity shall be determined by the Kiwanis International Board.

**Section 3.** If the Kiwanis International Bylaws are amended in such a way that necessitates revisions to the Standard Form for District Bylaws the District Board shall amend the district bylaws at the next

regularly scheduled board meeting to reflect such revisions and shall inform clubs and members.

#### **ARTICLE 14. SEVERABILITY**

**Section 1.** In the event that any provision of these bylaws is held invalid, all other provisions shall remain in effect.

#### **ARTICLE 15. INCORPORATION AND DISSOLUTION**

**Section 1.** The district will incorporate or register with the proper authority(ies) as may be required by applicable law and shall maintain such incorporation or registration as required by law.

**Section 2.** If the district ceases operations for any reason, the last District Board will provide for proper distribution of district funds or other assets, in accordance with applicable law. If the District Board does not so provide, the Kiwanis International Board shall do so.

#### **ARTICLE 16. GENERAL PROVISIONS**

**Section 1.** The district shall not be used for political purposes, including propaganda, trying to influence legislation, or participating in a campaign for or against any candidate for public office.

**Section 2.** The administrative and fiscal year of the district shall be October 1 – September 30.

\*Every place where the word “club” appears with an asterisk refers to a club in good standing as defined by Kiwanis International, per Article 1.

\*\*Every place the term “active member” (or member) appears with an asterisk refers to a club member in good standing with their club as defined by the club, per Article 1.

#### **ADOPTION CERTIFICATION**

If the district’s bylaws are amended, send one copy of all adopted amendments and one copy of the revised bylaws to the Governance Specialist at Kiwanis International ([governance@kiwanis.org](mailto:governance@kiwanis.org)) for review, approval, and filing. The district then will be notified when its amended bylaws are approved by Kiwanis International.

**These bylaws were adopted by the Capital District of Kiwanis International Board of Trustees on August 22, 2025.**

**Certified by Jeffrey M. Wolff, Executive Director**



## **Background**

In recent years, the Capital District has significantly altered the organization and duties that are carried out by the committees that organize our District Mid Year and District Convention. The Bylaws and Policy Committee was tasked with reviewing the current policies and prepare a revision to update our policies to conform with how these conferences are currently carried out for all district events. A subcommittee started work in October 2024 and has prepared a major revision for approval prior to the 2026 conference committees undertaking significant planning for their events.

## **Recommendation**

The Committee recommends that the Board of Trustees adopts the District Policy revision as attached. This will allow the conference and convention host committees to have clarification on the responsibilities of not only the committee but also support to be provided by the District Board in supporting these activities. The changes will help to streamline and clarify these activities and reflect how are conventions have been organized and managed over the last several years.

The biggest changes cover how the committee is organized, the responsibilities of various sub chairs and the role of the Executive Director. It also clarifies the timeline for when conference chairpersons shall be appointed so those committee can be organized in a timely manner.

In addition, the policy changes cover any potential regional midyear conference by requiring a standardized format across the district for any of these events to ensure consistency across the district.

Additions are underlined, and deletions are struck through the document. Sections 6 and 7 are the only sections impacted by this change.

## **Operational Impact**

If approved by the Board, the Executive Director will modify and publish a revised district policy code.

## **Financial Impact**

N/A

Respectfully submitted,

David Lurie  
Chair, Bylaws and Policy Committee



## SECTION 6 – DISTRICT MEETINGS

### A. Scheduling

- a. **District Convention** ~~The~~the Capital District Convention shall be held annually during the month of August as approved by the District Board of Trustees and the Board of Trustees of Kiwanis International. The meetings should not be less than two (2) days or more than three (3) days in duration.
- b. **Midyear Conference** Each year during the period January to April, a Midyear Conference will be held in the following format – district-wide, six regionals, or a combination of a single region and multiple regions going together. The Board will decide which option will be used two (2) years in advance of the scheduled conference based on ~~whether or not~~whether a host has come forward and which format would be most beneficial for the ~~District~~district.

#### i. District Midyear Conference

1. Should a club, Division, or Region, desire to host a District-wide Midyear Conference, they must present a conference proposal to the ~~Conventions and~~ Meetings Committee for review at the District Convention held thirty (30) eighteen (18) months prior to the proposed Conference.
2. Upon receipt of a proposal for a District-wide Midyear Conference, the ~~Conventions and~~ Meetings Committee will review the proposal and recommend a course of action to the Board. The Board will receive the report and, in consultation with the Governor-Elect elected at that District Convention, decide no later than twenty-four (24) eighteen (18) months before the proposed conference start whether to accept the proposal. The meetings should not be less than two (2) days or more than three (3) days in duration. If no proposal is presented, or the proposal(s) presented were not accepted, the Board will direct regions to hold Regional Midyear Conferences during the year under consideration.

#### ii. Regional Midyear Conferences

1. When Regional Conferences are held, the Lt. Governors-Elect, with the assistance of the Regional Trustees, will develop plans for the date, format, and location of their regional conferences and submit them to the ~~Conventions and~~ Meetings Committee no later than April 30 of the year prior to the scheduled conferences. A budget template for regional conferences is maintained in Appendix F of these Policy Statements.
- ~~1.2.~~ A standardized format and content for the Regional Midyear Conferences shall be determined by the Leadership Development and Education Committee in consultation with the Governor-elect.

The format shall be approved by the District Board of Trustees and then distributed to the Regions to plan for the event.

- c. The ~~Meetings Committee~~ Executive Director has the overall responsibility for ensuring that contracting for all meeting locations are completed at least two years in advance.

## **B. Designation of Host**

- a. ~~A chartered Kiwanis Club in good standing, group of clubs, a division, or region that desires to host a District Meeting shall extend an invitation, through the region's lieutenant governors, to the Conventions and Meetings Committee at least two (2) years in advance. The Executive Director shall extend an~~ invitation shall include dates, hotel(s) capability for housing, conference rooms, and banquet facilities. Upon Committee approval, the Committee Chair shall present the recommendation to the District Board of Trustees for approval. When the District Board approves the recommendation, the Executive Director notifies the Lieutenant Governors of the host region.

## **C. Designation of the Meeting Chairperson**

- a. Promptly, after notification, ~~the Host(s)~~ the Governor (during his year as Governor-elect) should nominate a ~~Chairperson~~ chairperson(s). The appointment of meeting chairperson shall be made no later than 18 months prior to the meeting. The nomination is to be made through the Lieutenant Governors for the sitting Governor's appointment. It should be noted that the duties of the Chairperson are time consuming, especially the final ~~six~~ three (36) months prior to the Meeting. So, it is essential that the Chair understands and is willing to commit to a position that will have constraints on personal time and obligations.

- ~~a.b.~~ In the case of Regional Conferences, each Regional Chairperson will communicate with the District Trustee serving as counselor to that Region, the Executive Director, the Lt. Governors of the Region, the Governor and Governor-elect ~~Conventions and Meetings Committee, and the Leadership Development Coordinator~~ on the progress and plans.

## **D. Responsibilities of the Capital District Governor**

- a. The Governor has the overall responsibility to plan and develop the Meeting Program including complete responsibility for the concept, format, schedules, speakers, menus and fees in consultation with Meeting Chairperson(s). The Governor must approve all planning phases of the Meeting.
- b. The Governor and spouse/guest shall be the host to the Kiwanis International Representative and Spouse/guest at the District Midyear Conference (if applicable).

## **E. Responsibilities of the Capital District Governor-Elect**

- a. The Governor-Elect has the responsibility for the training programs at all District Meetings. This includes the training of incoming club officers, and Lieutenant Governors as well as educational sessions for the attendees. The Capital District Leadership Development Coordinator is delegated to coordinate the training programs for incoming club officers.
- b. The Governor-Elect and spouse/guest shall be the host to the Kiwanis International Representative and spouse at the District Convention.

## **F. Responsibilities of the Executive Director**

- a. The Executive Director shall communicate to each chartered club and to the Secretary of Kiwanis International an official call to at least sixty (60) days prior to the date of the Meeting. Official Calls to District Meetings shall also appear in *The Capital Kiwanian*.
- b. The Executive Director shall be the Treasurer for all Planning Committees and shall be responsible for the payment of all invoices incurred by the Meeting.
- c. The Executive Director, as the agent for the Capital District, shall sign all contracts with the Host Venue and all other contracts.
- d. The Executive Director shall be responsible for the financial accounting of the Meeting to Capital District.
- e. The Executive Director shall record the official minutes of the House of Delegates at District Convention.
- f. The Executive Director shall serve as a resource as needed.

## **G. Responsibilities of the Kiwanis International Representative**

- a. The appointment of the Kiwanis International Representative occurs after the Kiwanis International Convention. The District Governor is notified by Kiwanis International of the appointment. The Representative has the responsibility of presiding at the Installation Ceremony on Sunday morning of District Convention and will be provided a copy of the Installation Procedures in advance.

## **H. Meeting Program**

- a. Capital District Committee Meetings at District Conventions or District Midyear Conferences can be held on Friday between 8 AM and 5 PM. During this time frame, certain training and leadership sessions may also be scheduled. The format for Meetings on Saturday is a combination of general and educational sessions.
  - i. The election of Capital District Officers will take place at the District Convention. A House of Delegates business session will be scheduled on

Saturday afternoon and the Election of Officers will be held on Sunday morning.

- b. Although not a part of the formal portion of the Meeting Program, additional activities or functions may be offered by the Meeting Committee for the purpose of enhancing fellowship among Kiwanians, spouses and guests. These activities shall not conflict with the Meeting Program.
- c. The scheduling of meetings, which are essential for the Governor and Governor-Elect to attend, shall not overlap.
- d. The Governor, Governor-Elect and any candidates for the position of Vice Governor ~~Elect~~ shall not hold receptions on the evening of the Governor's Banquet at District Convention. Instead, an open reception with a cash bar should be held so all attendees may participate.

### **I. Host Venue**

- a. Generally, the Host Venue has been determined when the invitation to host a Meeting was proposed. If not already completed, the Executive Director shall begin negotiating with the Sales Associate of the Host Venue for adequate housing, conference rooms, and banquet facilities. A contract shall be obtained from the Sales Associate outlining cost of rooms, number of rooms, number of handicapped rooms, and number of complimentary rooms. It is customary for the hotel to provide one (1) gratis room for every fifty (50) rooms reserved. Conference areas, additional space requirements and equipment availability and cost shall also be verified.
  - i. When additional housing is required outside of the primary facility is needed, the Sales Associate of the Host Venue negotiates with the sales teams of the satellite hotel(s) for additional rooms and rates. This is incorporated in the Host Venue room accommodation contract.
  - ii. After the above information has been ascertained, the Executive Director shall confer with the Governor for approval before entering formal written contracts. Once the formal written contracts are developed, the Executive Director reviews with the Host Venue Sales Associate the contracts and, if satisfactory, signs them as the Capital District Agent. Contracts shall be periodically reviewed by the Executive Director and the Sales Associate for any necessary changes. Any contract requiring a change shall be rewritten, approved by the Governor and signed by the Executive Director.
  - iii. The contract with the Host Venue shall clearly stipulate that no bills will be honored unless verified by the Executive Director or designated representative in accordance with the terms of the contract.

### **I.J. Responsibilities of the Meeting Chairperson(s)**

- a. Upon selection, the Chairperson(s) should consult Section 6 of the District Policy

Statements for procedures on the District Meetings.

- b. The chairperson shall meet with the Governor, Governor-Elect, Vice Governor, the Immediate Past Governor, the Executive Director and the Chairperson of the Committee on Finance ~~and Budget~~ for an orientation before beginning meeting preparations.
- ~~c. Generally, the Host Venue has been determined when the invitation to host a Meeting was proposed. If not already completed, the Chairperson shall begin negotiating with the Sales Associate of the Host Venue for adequate housing, conference rooms, and banquet facilities. A contract shall be obtained from the Sales Associate outlining cost of rooms, number of rooms, number of handicapped rooms, and number of complimentary rooms. It is customary for the hotel to provide one (1) gratis room for every fifty (50) rooms reserved. Conference areas, additional space requirements and equipment availability and cost shall also be verified.~~
  - ~~i. When additional housing is required outside of the primary facility is needed, the Sales Associate of the Host Venue negotiates with the sales teams of the satellite hotel(s) for additional rooms and rates. This is incorporated in the Host Venue room accommodation contract.~~
  - ~~ii. After the above information has been ascertained, the Chairperson shall confer with the Governor for approval before entering into formal written contracts. Once the formal written contracts are developed, the Executive Director reviews with the Host Venue Sales Associate the contracts and, if satisfactory, signs them as the Capital District Agent. Contracts shall be periodically reviewed by the Chairperson and the Sales Associate for any necessary changes. Any contract requiring a change shall be rewritten, approved by the Governor and signed by the Executive Director.~~
  - ~~iii. The contract with the Host Venue shall clearly stipulate that no bills will be honored unless verified by the Executive Director or designated representative in accordance with the terms of the contract.~~
- d.c. The Chairperson shall organize a Planning Committee including persons to serve as/oversee:
  - a. Vice Chairperson (if required)
  - b. Secretary
  - c. Finance (Executive Director)
  - ~~d. Physical Arrangements~~
  - ~~e. Housing~~
  - d. Registration
  - f.e. Workshops (Governor-elect and/or Leadership Development Coordinator)
  - g.f. Program and Printing
  - h.g. Entertainment and Speakers
  - i.h. Fundraising and Hospitality Advertisements and Sponsorships
  - j.i. Publicity
  - k.j. Service Leadership Programs and First Timers and Social Activities
  - l. Meals/Catering
  - k. Flowers Decorations and VIPs

- l. Stage Manager
    - m. Audiovisual
    - n. Any other sub-committees deemed necessary by the Chairperson.
  - i. The Chairperson shall recommend to the Governor members for appointment to the Convention Committee. The Governor will appoint the Executive Director to be the Treasurer for the Planning Committee.
  - ii. The Chairperson shall provide information to the committee members of their duties and responsibilities. In addition, the committee members should be aware of the role of the Governor, Immediate Past Governor, Governor-Elect, Executive Director, ~~the Lieutenant Governor of the Host Division, District Trustee of the Host Region~~, Leadership Development & Education Coordinator, ~~Host Club President~~ and the Hotel Sales and Registration Associates.
  - iii. The Chairperson shall develop an on-going schedule for committee meetings. This plan shall begin no later than a year prior to the previous Meeting. It should outline dates, location of meetings and transactions for the meetings. In addition, any information required by the Capital District should also be noted in the schedule. The Schedule Plan shall be made available to the Governor and Governor-Elect. The Governor and Governor-elect should participate in all discussions, if possible. The Vice Governor-Elect should also participate in preparation for the Governorship.
- e. The Executive Director and Chairperson shall develop a Financial Plan (budget), detailing proposed income and expenses. The Chairperson shall present the plan to the Capital District Finance Committee for approval at the meeting proceeding the intended Meeting. If approved, the Capital District Finance Chairperson or Executive Director and Immediate Past Governor, presents the Finance Plan to the District Board of Trustees for approval. When the Plan is approved, it becomes the Budget for the Meeting.
- f. The Chairperson shall oversee the accuracy of bills and refer them to the ~~Finance Chairperson of the Planning Committee for recording and forwarding to the~~ Executive Director for payment. Invoices/receipts submitted to Executive Director for reimbursement shall be done electronically.
- g. A presentation inviting Kiwanians to the Meeting shall be made by the Chairperson or a designated person. This invitation shall be presented at the Sunday Closing Session of the preceding Meeting.
- h. The Chairperson shall have ~~continuing~~continued liaison with the Governor, Governor-Elect, Vice Governor, Executive Director, Leadership Development Coordinator, ~~Hotel Personnel~~, and the ~~Conventions &~~ Meetings Committee.
- ~~i. The Chairperson shall be responsible for the assignment of complimentary lodging.~~

~~j.i.~~ The Chairperson shall prepare and submit correspondence or reports pertaining to the Meeting as required.

~~k. The Governor elect Chairperson shall prepare a list of workshop facilitators and place a notice, for the session, listing time and location to the Registration Committee to be placed in each facilitators registration packet. Arrangement of workshop facilitators is the responsibility of the Leadership Development Coordinator.~~

~~l. The Chairperson shall give the final meal count to the Hotel's Sales Associate 72 hours prior to the meal functions. The payment of the meal function is based on this count. If the attendees number more or less, this figure must be verified and approved by the Meeting Chairperson and the Executive Director before payment.~~

~~m.j.~~ The Chairperson shall consult with the Governor (for Midyear Conference) or the Governor Elect (for District Convention) to identify the Kiwanis International Representative, if attending, and any particulars needed for the Representative's visit.

#### **J.K. Financial Plan/Budget**

- a. Administrative and complimentary expenses are procured from charges for registration, a meal surcharge, and any Meeting Committee functions. The registration fee should be set at a reasonable cost. Meal costs should be secured in writing from the Host Venue at the time the contracts are negotiated.
- b. By developing the Financial Plan/Budget early, meeting sub-committee chairpersons will have general guidelines for expenditures. The sub-committee chairpersons shall endeavor to maintain expenses as low as prudently possible. The Meeting Chairperson shall review the budgets of the sub-committees with the respective chairpersons to ensure that the expenses are contained within the budget guidelines. The object is that the Meeting does not incur a deficit.
- c. The Financial Plan/Budget shall include the following line items:
  - i. Cost of registration, meals, and lodging
  - ii. Estimated Committee expenses, such as:
    1. Transportation, if required,
    - ~~2. Telephone expenses,~~
    - ~~3.~~2. Flowers,
    - ~~4.~~3. Audio/Visual equipment and staffing,
    - ~~5.~~4. Publicity
    - ~~6.~~5. Postage
    - ~~7.~~6. Supplies,
    - ~~8.~~7. Badges and Holders,
    - ~~9.~~8. Color Guard Honorarium (donation, if approved by the Committee),
    - ~~10.~~9. Ribbons,
    - ~~11. Youth Activities,~~



- ~~12.10.~~ Activities for First Timers
- ~~13.11.~~ Equipment rental,
- ~~14.12.~~ Gifts,
- ~~15.13.~~ Miscellaneous, ~~and~~
- ~~16. Planning Committee Wrap-up Dinner~~

iii. Complimentary expenses of the Meeting are:

1. Registration including all meals, functions of the Meeting and lodging for:
  - a) Governor and spouse or a guest (suite where available)
  - b) Governor-Elect and spouse or a guest (suite where available)
  - c) Vice Governor and spouse or a guest
  - d) Kiwanis International Representative and spouse or a guest (if attending)
  - e) Executive Director and spouse or a guest
  - f) Immediate Past Governor and spouse or a guest
  - g) Capital District CKI Governor
  - h) Capital District Key Club Governor
  - i) Meeting Chairperson
  - j) Editor of *The Capital Kiwanian*
2. As registration costs can be expensed from their own respective SLP Administrator budgets, lodging only shall be provided complimentary for:
  - a) Capital District CKI Administrator
  - b) Capital District Key Club Administrator

iv. Gifts for Dignitaries

1. A suitable gift valued between \$50-\$100 shall be purchased and presented to the Kiwanis International Representative (if in attendance at District Convention).
2. A suitable gift valued between \$125-\$150 shall be purchased and presented to the retiring Governor at District Convention.
3. Shall acquire gifts and/or recognition items for workshop facilitators not to exceed ten (\$10) dollars each and provide to the Governor-elect who will handle distribution
4. Shall acquire recognition gifts for major/keynote speakers, Key Club and CKI District Governors not to exceed forty (\$40) dollars US each and provide to Stage Manager who will handle distribution

v. Additional Standard Expenses

1. Cost of the Friday breakfast for the Capital District Finance Committee at District Convention. (maximum 10 people)
2. Cost for set-up and hotel service personnel for the Capital District Governor's Reception.



3. Any cost, i.e. flag rental, interpreter, etc. if the Kiwanis International Representative is from outside the U.S.A.
4. Cost of any Meeting function, which the Planning Committee approves, should be self-supporting (i.e. entertainment on Friday night, spouses' activities, etc.)

vi. Not Chargeable to the Meeting

1. Past Governor's ~~Dinner Luncheon~~ at District Convention. This ~~Thursday Dinner~~ ~~Friday Luncheon~~ is arranged by the ~~Meal/Catering Committee~~ Executive Director under the direction of Past Governors' Chairperson. Cost is individually collected and delivered to the Executive Director for payment. The Governor-elect is hosting the Kiwanis International Representative and spouse or guest (if attending) and is responsible for covering their costs for dinner.
2. Leadership Luncheon at District Convention. This Friday Luncheon shall be arranged by the ~~Meal/Catering~~ Executive Director under the direction of the Governor & Governor-Elect. Individual cost is collected and delivered to the Executive Director for payment.
3. Cost of lodging for one (1) night and Governor's Banquet cost for the Teenager of the Year and parents at the District Convention. Payment is the responsibility of the Capital District Foundation.
4. The ~~Meeting~~ Committee may elect to absorb, in a duly approved motion of the Committee, certain other expenses provided that no deficit is created.
5. Should any financial matters become objects of dispute, the Meeting Chairperson will immediately seek counsel with the Governor. In the event expenses exceed income, the deficit shall henceforth be a financial obligation of the Capital District.
6. Any expenses of any service project planned for the District Meeting shall not come from the Meeting or District Budget.

**K.L. Capital District Credentials Committee (District Convention Only)**

- a. At least ninety sixty (~~960~~) days prior to each duly called Convention, the Governor shall appoint a Credentials Chairperson ~~and committee members~~ from any region that does not have an announced candidate.

~~b. The Convention Chairperson shall arrange for an appropriate area for the Credential desk, plus, table, chairs, and a sign identifying the area.~~

~~c. The Convention Chairperson shall determine the hours the Credential Desk is~~

~~open, concurring with the Credential Chairperson. Normally the desk is open Friday 9:00am—5:00pm and Saturday 9:00 am—3:30 pm. The hours should be published in the Convention Program and attendees should be reminded at all general sessions.~~

- b. ~~The delegate ribbons are provided to the Registration Credentials Chairperson by the Executive Director and distributed in the registration package. These ribbons are given at the time the delegate or delegate at-large is certified by the Executive Director~~Credential Committee~~.~~
- c. ~~The delegate cards are provided to the Registration Chairperson by the Committee Secretary and distributed in the registration package. These cards are given at the time the delegate or delegate at-large is certified by the Executive Director.~~
- d. The Executive Director shall provide the Credentials Committee Chairperson a report detailing the number of delegates and delegates at large registered at the convention prior to the first House of Delegates. The Credentials Chairperson shall read the report at the House of Delegates.

#### **L.M. District Convention Elections Committee (District Convention Only)**

- a. At least ninety sixty (~~960~~) days prior to each duly called Convention, the Governor shall appoint an Election Committee Chairperson. The Chairperson will conduct the elections for the offices of Governor, Governor-Elect and Vice Governor, as well as for a candidate for endorsement for International Trustee, as needed. The Chairperson will appoint sufficient members of the committee as Sergeants-at-arms and ballot counters. Each announced Vice Governor candidate will be given the opportunity to appoint an equal number of members to the committee. The committee shall be formed even if there is only one announced Vice Governor candidate, ~~in order to~~ be prepared if there are additional nominations from the floor.
- b. The Executive Director and Convention Chairperson shall confer with the Elections Chair for a suitable location where only certified delegates may enter for ballot counting. The Convention Chairperson should also inquire if any other type of assistance is needed, i.e. ballot boxes, printing of ballots, etc.

#### **M.N. Final Meeting Report**

- a. Within, but not later than forty-~~five~~ (45) days after the close of the Meeting, the Convention Chairperson shall file with the Capital District Governor and Executive Director, a copy of a complete and detailed report on the events of the Meeting, including the detailing of income and expenditures. Included will be an attendance report ~~prepared by the Finance Sub-committee and~~ detailing the number of Kiwanians registered for the Convention; the number of First Time Convention attendees; the number of guests attending; the number of delegates and delegates-at-large in attendance (if District Convention); the number of

persons from each club in the Capital District registered and in attendance, identifying those Kiwanis clubs with no one in attendance at the meeting and the number of Presidents-Elect and Lt. Governors-elect attending.

## **N.O. Guidelines for ~~the~~ Sub-Committee Chairpersons**

### **a. Meeting Secretary**

- i. Shall be responsible for recording and maintaining the minutes and list of action items of all meetings of the Planning Committee as well as the distribution of the minutes and action items to all Committee members, the Governor, Governor-Elect, Vice Governor, the Executive Director, and the Meetings Committee Chairperson.
- ii. Shall notify members of all meetings.
- iii. Shall arrange for the printing of all tent cards (including reserved table signs if not provided by hotel), specialized signs, (i.e. a chart listing the location of Hospitality Rooms and Convention Office) and all session door signs for workshops and meals.
- iv. Shall be responsible for the printing of the following materials:
  1. Delegate cards.
  2. Meal tickets - each meal event should have tickets with a different color and show the meal name, date, time, location, and price. Meal tickets are needed for all general sessions where a meal is served. Dietary requirements should also be addressed with special tickets.
  3. Tickets for any other Meeting function.
  4. Envelopes for attendees, if using printed ones.

### **b. ~~Finance Chairperson~~ Executive Director**

- i. Shall assist the Meeting Chairperson in preparation of the Financial Plan/Budget in accordance with the policies contained herein. ~~Capital District Meeting Budget Guide.~~
- ii. Shall refine the Budget as necessary.
- iii. Shall coordinate ~~with the Executive Director~~ the procedures for depositing funds, certifying bills for payment and forwarding bills.
- iv. Shall authenticate all bills, corroborating with the Meeting Chairperson as necessary.
- v. Shall be responsible for receiving and accounting for all funds generated by the Meeting.

- vi. Shall develop procedures for online registration, refunds, reporting on registration forms to the Meeting Chairperson.
- vii. Shall prepare an online registration form with appropriate information about fees, guest activities, contact person with telephone number, and hotel(s) no less than four (4) months prior to the Meeting and provide location of online registration form to the Committee Chairperson and the Editor of The Capital Kiwanian
- viii. Shall work with the Registration Committee to verify online registrations and funds collected. ~~Shall forward on a weekly basis all receipts and bills to the Executive Director.~~
- ix. Shall prepare ~~monthly~~ financial progress reports for presentation at the Planning Meetings.
- x. Shall maintain a running account of registrations broken down by date, Kiwanians, spouse, Service Leadership Program members, and by club, Division and Region. This is to be sent to the ~~Executive Director~~ Registration Chairperson weekly.
- xi. Shall prepare a final analysis of the finances of the Convention/ Conference and forward it to the ~~Executive Director.~~ Meeting Chairperson.

#### **~~Physical Arrangements Chairperson~~**

- xii. Shall work with the Hotel Sales Associate to establish:
  - 1. Location and number of conference rooms
  - 2. Location and capacity of banquet facilities
  - 3. Location for Registration area and Convention Office
  - 4. Area for Exhibits. (Tables, linens, chairs, electricity, etc.)
  - ~~5. Area for Credential Desk (District Convention Only)~~
  - ~~6.5.~~ Area for House of Delegates (District Convention Only)
  - ~~7.6.~~ Area for Election Committee (District Convention only)
  - ~~8. Location for Caring Corner and Hospitality area~~
- xiii. Shall determine availability and cost of audio/visual equipment. Shall arrange for equipment and staff as necessary.
- xiv. Shall determine the availability of risers, if needed and the placement of a piano, if used.
- xv. Shall ~~work with the Executive Director to~~ establish layouts for District Committee meetings.
- xvi. Shall confer with the Governor-elect and/or Leadership Development

Coordinator to establish the schedule of Workshop Sessions.

- xvii. Once the schedule is established, shall develop Session Set-up Forms with the Governor-elect and/or Leadership Development Coordinator. This form shall include seating arrangements, equipment needed, number in audience, names on tent card, etc.
- xviii. Shall confer with the Governor to establish layout for the House of Delegates. (District Convention Only)
- xix. Shall provide the Secretary ~~Printing Chair~~ with a list of:
  - 1. Door signs with the title of the training sessions.
  - 2. Names for tent cards needed for meeting, workshop sessions and specialized signs, i.e. a chart listing the location of Hospitality Rooms, and Convention Office.
- xx. Shall determine Kiwanis banners needed and arrange for their display. Shall also arrange for availability and proper set-up of flags.
- xxi. Shall confer with the Hotel's Banquet Services Manager prior to the Meeting- to develop the meal prices for any meal that is to be included with a Convention/ Conference function and/or activity.
- xxii. Shall review meal plans with the Governor for approval. Once prices are established, present them to the Meeting Chairperson for incorporation into the Budget. Final meal contracts must be signed by the Executive Director.
- xxiii. Shall give the final meal count to the Hotel's Sales Associate 72 hours prior to the meal functions. The payment of the meal function is based on this count. If the attendees' number is more or less, this figure must be verified and approved by the Meeting Chairperson and the Executive Director before payment.
- xxiv. Shall plan to handle special dietary requirements, i.e. vegetarian, allergies, etc.
- xxv. Shall work with the Past Governor Chairperson to arrange for the Past Governor's Dinner. (NOTE: This is not a budget item.)
- xxvi. Shall work with the Governor and Governor-Elect to arrange the Leadership Luncheon. (NOTE: This is not a budget item.)
- xxvii. Shall arrange for food and beverage items for the Capital District Reception.
- xxviii. Shall obtain written contracts with cost of items for the reception.

These contracts need the Governor's approval and are forwarded to the Executive Director for signatures.

~~xxi.~~xxix. Shall develop a daily Matrix Set-up Sheet showing each District Meeting, Board of Trustees, House of Delegates (District Convention only), Workshop Sessions, and Meeting Functions by time, room, presenter, equipment needed, and times the Registration Desk is open. Shall provide the Hotel Set-up Associate with a copy for proper room arrangement.

~~xxx.~~ Shall check each committee, education and banquet area during the Meeting for proper set-up, equipment, tent cards, and door signs. (NOTE: Large envelopes containing the necessary tent cards, door signs, and arranged by date and time can be prepared for each training session, committee meeting and banquet.)

~~xxxi.~~ Shall be responsible for assignment of complimentary lodging and reviews this with the Registration Associate of the Host Venue.

~~xxxii.~~ Shall inquire of the current class of Lieutenant Governors and Trustees the type of lodging and costs available for Hospitality Rooms.

~~xxxiii.~~ Shall review room reservations with the Hotel Registration Associate and arrange housing so that all VIP's, disabled persons, and Meeting Chairperson and instructors who are presenters are housed in the Host Venue. A list of these people should be provided to the Hotel Registration Associate and confirmed by the Host Venue, but room assignments shall remain confidential.

~~xxii.~~xxxiv. Shall inquire if the Host Venue has available equipment for the disabled.

#### **c. Registration Chairperson**

- ~~i.~~ Shall develop procedures for online registration, refunds, reporting on registration forms to the Finance Chairperson and Executive Director.
- ~~ii.~~ Shall prepare, under the direction of the Meeting Chairperson, an online registration form with appropriate information about fees, guest activities, contact person with telephone number, and hotel(s) no less than six (6) months prior to the Meeting.
- ~~iii.~~ Shall provide location of online form to the Executive Director and the Editor of *The Capital Kiwanian* no less than five (5) months before the Meeting. This is Exec. Director function

~~iv.~~i. Shall obtain and review with the Meeting Chairperson a list of supplies with prices, i.e. badges, badge holders, envelopes, etc.

~~v.~~ii. Shall order supplies no less than six (6) months prior to the Meeting

~~vi.iii.~~ Shall inventory ribbons and obtain needed ones from the Executive Director and the Foundation Executive Secretary.

~~vii.iv.~~ Shall arrange for any technical assistance prior to and during the times the Registration Desk is open during the Meeting.

~~viii.v.~~ Shall arrange for equipment needed during the Convention/ Conference and for delivery to the Convention Office.

~~ix.vi.~~ Shall prepare an envelope for each attendee, badge with complete name and club, spouse/guest badge with complete name, badge holder, tickets ordered, Meeting Program, and generic material such as tourism information.

~~x.vii.~~ Shall indicate on the outside of the envelope the individual's name, Kiwanis club, and tickets enclosed.

1. Shall devise an appropriate plan for indicating registrants who owe money. ~~(NOTE: One way may be by placing a red dot on the front of the envelope.)~~

~~xi.~~ ~~Shall devise a plan for any refunds with the Finance Chairperson.~~

~~xii.viii.~~ Shall staff the Registration Desk at the Meeting. The Staff should consist of the Registration Chairperson, technical assistance, and at least three (3) assistants using the following ~~suggested~~ schedule: Friday 1-5PM; and Saturday 7AM-3PM.

~~xiii.ix.~~ Shall prepare a plan for "walk-in" registrants. Necessary supplies, blank registration forms and partially pre-filled envelopes, shall be in place. All "walk-in" attendees are required to register and pay the registration fee ~~in order to~~ attend any activity or function of the Meeting. If they desire meal or function tickets, the price is not discounted. If tickets are turned in, after a refund, they can be resold.

~~xiv.x.~~ Shall prepare the envelopes for the complimentary guests and have them filed separately from the other envelopes.

~~xv.xi.~~ Shall alphabetize envelopes in boxes. ~~(NOTE: A good box to use is the size that holds 10 reams of paper.)~~

~~xvi.xii.~~ Shall coordinate with ~~Meal/Catering Chairperson~~ Executive Director meal numbers and special dietary requirements.

**~~d. Housing and Transportation Chairperson~~**

- ~~i. As stated previously, the Meeting Chair is responsible for assignment of complimentary lodging and reviews this with the Registration Associate of~~

~~the Host Venue.~~

- ~~ii. Shall inquire of the current class of Lieutenant Governors the type of lodging desired, such as suites, if available, connecting doubles, a double; or, two (2) Divisions sharing a double as a Hospitality Room.~~
- ~~iii. Shall review room reservations with the Hotel Registration Associate.~~
- ~~iv. Shall arrange housing so that all VIP's, disabled persons, and District Chairperson and instructors who are presenters are housed in the Host Venue. A list of these people should be provided to the Hotel Registration Associate.~~
- ~~v. Shall inquire if the Host Venue has available equipment for the disabled, i.e. wheelchairs, walkers, etc.~~
- ~~vi. The Host Venue Registration Associate shall work with the Satellite hotel(s) personnel for room assignments.~~
- ~~vii. Room assignments shall remain confidential.~~
- ~~viii. The Host Venue and or/satellite hotel(s) shall confirm room reservations.~~
- ~~ix. Shall have a list of all registrants indicating hotel assignment and room assignment.~~
- ~~x. The Housing Committee shall have a representative on call and stationed at the Registration Desk at all times during the Meeting.~~
- ~~xi. Shall arrange for shuttle service between hotels if needed.~~

#### **d. Workshops**

- i. Shall arrange and prepare a list of workshops including facilitators and place a notice, for the session description, listing time and location to the Registration Committee to be placed in each facilitators' registration packet.
- ii. Shall prepare a list of workshops including facilitators, workshop descriptions, time and location to the Program Chairperson to be placed in the convention booklet.

#### **e. Program and Printing Chairperson**

~~Shall arrange for the printing of all tent cards and all session door signs.~~

- i. Shall collect and provide the following information required to for the convention program to the person responsible for the design and layout of convention booklet
  - 1. Photos and statements from Kiwanis District Governor, CKI District Governor, Key Club District Governor, meeting Chairperson and visiting Kiwanis International officer (if attending)
  - 2. Photos and information on guest speakers at major sessions
  - 3. Validate/update list of past Governors
  - 4. Listing current district officers and committee chairs (from Executive Director)
  - 5. Agenda for all major sessions (from Stage Manager)
  - 6. List of all workshops including descriptions, times and



- locations (from Workshop Chairperson)
- 7. Maps of hotel/conference facility
- 8. Advertisements (from Sponsorships and Advertisement Chairperson)
- 9. Any additional information that is required for program booklet

ii. Shall arrange the printing of the ~~program booklet~~following items, to be delivered to the Registration Committee two (2) weeks before the Meeting after it has been established and approved by the Governor and Executive Director.:

- 1. ~~Program Booklet and “Meeting At A Glance” card. Number required is to be a committee decision. The Program for the Meeting will be furnished after it has been established and approved by the Governor.~~
- 2. ~~Meal tickets. Each meal event should have tickets with a different color and show the meal name, date, time, location, and price. Meal tickets are needed for all general sessions where a meal is served. Dietary requirements should also be addressed with special tickets.~~
- 3. ~~Tickets for any other Meeting function.~~
- 4. ~~Envelopes for attendees, if using printed ones.~~
- ii. ~~Shall acquire the necessary photographs and VIP Statements.~~

#### **f. Entertainment/Speaker Chairperson**

- i. Shall arrange for a Color Guard Unit for posting colors at the Opening Breakfast and retrieving/retiring the colors at the closing Breakfast.
- ii. Shall invite the mayor or local government official of the Host community to extend a welcome at the Opening Breakfast.
- iii. Shall arrange for a Keynote speaker at the Saturday Luncheon and a speaker for the Sunday Breakfast, with the Governor's approval.
- iv. If possible, arrangements for speakers should be made early in the planning stage. Conduct follow-up with speakers no later than one month prior to the meeting. Any costs for speakers will need the Meeting Committee’s approval.
- v. Shall arrange for musical interlude prior to the Opening Ceremonies, at meals, and during the meals, if desired.
- vi. Shall arrange for entertainment at the Governor’s Banquet if desired by the Governor.

vii. Shall acquire the necessary photographs and VIP Statements and provide to the Stage Manager and Program Chairperson.

**f. ~~Meals/Catering Chairperson~~**

- ~~i. Shall develop the meal prices for any meal that is to be included with a Convention/ Conference function and/or activity.~~
- ~~ii. Shall review meal plans with the Governor for approval. Once prices are established, present them to the Meeting Chairperson for incorporation into the Budget. Final meal contracts must be signed by the Executive Director.~~
- ~~iii. Shall make arrangements to handle special dietary requirements, i.e. vegetarian, allergies, etc.~~
- ~~iv. Shall work with the Past Governor Chairperson to arrange for the Past Governor's Luncheon. (NOTE: This is not a budget item.)~~
- ~~v. Shall work with the Governor and Governor Elect to arrange the Leadership Luncheon. (NOTE: This is not a budget item.)~~
- ~~vi. Shall arrange for food and beverage items for the Hospitality area, if any.~~
- ~~vii. Shall arrange for food and beverage items for the Capital District Reception.~~
- ~~viii. Shall obtain written contracts with cost of items for the Hospitality area and cost for the Reception. These contracts need the Governor's approval and are forwarded to the Executive Director for signatures.~~

**g. Advertisements and Sponsorships Chairperson**

- i. Shall develop and publish a package which outlines all the sponsorship and advertisement opportunities for individuals, clubs and outside organizations that are available for the meeting.
- ii. Shall work with the Publicity Chairperson to publicize this information to advertise this information on the district social media channels.
- iii. Shall receive and review all program advertisements and sponsorship agreements prior to them being included in the meeting.
- iv. Shall submit all advertisements for the program no later than twenty-one days (21) before the conference inclusion to the Program Chairperson.

**g.h. Publicity Chairperson**

- i. Shall plan and implement a schedule for publicity activities.
- ii. Shall review with Meeting Chairperson and Executive Director any publicity to be released prior to its publication.
- iii. Shall plan and implement a suitable public relations and publicity program for the Meeting utilizing all available channels:

1. *The Capital Kiwanian*
2. Capital District Website
3. Capital District-wide Email Blasts
4. Social Media
5. Lt. Governors/Trustees
6. District Public Relations Chairperson

#### **h.i. Service Leadership Programs and First Timers and Social Activities Chairperson**

- ~~i. Shall coordinate with local Key/CKI clubs to include the use of their personnel in staffing Meeting activities.~~
- ~~ii. Shall arrange for any Service Leadership Program member activities, if any. The cost must receive Committee approval.~~
- ~~iii. Shall be the liaison with guests from any Service Leadership Program clubs.~~
- i. Shall arrange First Timers activities, if any. The cost must receive Committee approval.

~~iv.~~ii. Shall arrange a First Timers welcome session or workshop.

#### **i. Guest Activities Chairperson**

- ~~i.~~iii. Shall arrange activities for guests on Friday and Saturday.
- ~~ii.~~iv. Shall develop a self-supporting budget for these activities for Committee approval.
- ~~iii.~~v. Shall arrange for transportation for the activity.
- ~~iv. Shall work with the Immediate Past Governor's spouse to arrange some type of activity for Past Governor's spouses.~~

#### **j. Caring Corner/Hospitality Chairperson**

- ~~i. Interface with the Capital District Foundation's Caring Corner Chairperson to determine the arrangements for Caring Corner.~~
- ~~ii. Communicate the number of tables for crafts, room arrangement and other equipment needed to the Physical Arrangements Chairperson.~~
- ~~iii. Shall arrange for a Hospitality Area. Coordinate with the Meals/Catering Executive Director Chairperson for type of beverages and food items with cost.~~

#### **k. Ceremonies/Speaker Chairperson**

- ~~i. Shall handle protocol for all Meeting events.~~
- ~~ii. Shall arrange for a Color Guard Unit for posting colors at the Opening Breakfast and retrieving/retiring the colors at the closing Breakfast.~~
- ~~iii. Shall invite the Mayor or local government official of the Host community to extend a welcome at the Opening Breakfast.~~

- ~~iv. Shall arrange for a Keynote speaker at the Saturday Luncheon and a speaker for the Sunday Breakfast, with the Governor's approval.~~
- ~~v. If possible, arrangements for speakers should be made early in the planning stage. Any costs for speakers will need the Meeting Committee's approval.~~
- ~~vi. Shall arrange for musical interlude prior to the Opening Ceremonies, at meals, and during the meals, if desired.~~
- ~~Shall arrange for entertainment at the Governor's Banquet if desired by the Governor.~~
- ~~vii. Shall coordinate with the Governor to prepare head table (if utilized) seating charts and reserved table list for all meals. Tables may be reserved for Past Governors and Spouses, District Trustees and spouses, District Chairperson and spouses, and the current class of Lieutenant Governors and spouses.~~
- ~~viii. Shall provide a list of head table (if utilized) name cards, and VIP table signs needed to the Printing Chairperson.~~
- ~~ix. Shall work with the Executive Director for proper set up of banquet areas.~~
- ~~x. Shall arrange for ticket takers at all meal functions.~~

#### **i.j. Decorations and VIP/Flowers Chairperson**

- ~~i. Shall provide flower arrangements~~ centerpieces ~~for the tables at all meal functions.~~
- ~~ii. Shall acquire gifts and/or recognition items for workshop facilitators, Key Club and CKI District Governors, and visiting Kiwanis International officer at District Convention not to exceed values specified in this policy document and provide to Stage Manager who will handle distribution~~
- ~~iii. Shall have flower arrangements and/or gift baskets placed in the rooms prior to the arrival of the:~~
  - 1. Governor and spouse or a guest
  - ~~2. Governor Elect and spouse or a guest~~
  - ~~3. Vice Governor and spouse or a guest~~
  - ~~4. Executive Director and spouse or a guest~~
  - ~~5. Immediate Past Governor and spouse or a guest~~ Kiwanis International Representative and spouse or a guest.
- ~~iii. Shall arrange for two (2) one dozen bundles of Roses, wrapped and with bows, for presentation at the closing business session Sunday. One dozen is RED for the presentation to the Governor Designee's spouse, and the other dozen is YELLOW for presentation to the retiring Governor's spouse. (District Convention Only)~~
- ~~Shall provide corsages and boutonnieres for the District Officers and spouses at the Governor's Banquet of District Convention.~~

- iv. Shall provide the ~~Executive Director Planning Committee~~ with a budget for the above ~~items~~ ~~flowers~~ for approval.

**k. Stage Manager**

- i. Shall handle protocol for all Meeting events.
- ii. Shall serve as the meeting script master and prepare a script for all major sessions. Shall be responsible for working with session emcees to ensure they understand the content of the session they are emceeding and provide draft copies of scripts to emcees to assist in their preparation.
- iii. Shall be responsible for the preparation of script books to be utilized at the podium and by the audiovisual staff and ensure they are delivered no less than fifteen (15) minutes prior to a session.
- iv. Shall coordinate with the Governor and Executive Director on the agendas for each session and ensure they follow the same order as they will appear in the convention program.
- v. Shall provide for review to the Governor, Executive Director and Meeting Chairperson a draft of the script for each major session. As needed, the Foundation President and Elections Committee shall also be included for the review of the script for the House of Delegates and Foundation Annual Meeting.
- vi. Shall coordinate with the Governor and Executive Director to prepare seating charts and reserved table list for all meals. Tables may be reserved for Past Governors and Spouses, Executive Officers, District Trustees and spouses, District Chairperson and spouses, and the current class of Lieutenant Governors and spouses.
- vii. Shall prepare presentation slides to be utilized during the sessions.
- viii. Shall provide a list of head table (if utilized) name cards, and VIP table signs needed to the Meeting Secretary.
- ix. Shall work with the Executive Director for proper set-up of banquet areas including equipment, tent cards, decorations and door signs along with room layouts.
- x. Shall arrange for ticket takers at all meal functions.
- xi. Shall ensure recognition items are received from VIP and Decorations Chairperson and available for presentation at the appropriate session.

**l. Audiovisual Chairperson**

- i. Shall work with the Executive Director to determine equipment needed for the major sessions of the convention including screens, projectors, sound boards and other equipment for major sessions.
- ii. Shall work with the Stage Manager to ensure all equipment is prepared and tested prior to each session
- iii. Shall receive copies of the script book from the Stage Manager for use during the session.
- iv. Shall receive presentation slides to be utilized for each session from the Stage Manager.

**m. Exhibits Chairperson**

- i. Shall work with the ~~Physical Arrangements Chairperson~~ Executive Director to determine space availability.
- ii. Shall solicit exhibits from Capital District Committee Chairpersons and Clubs three (3) months prior to the event. The communication should also include “Rules for Exhibitors”.
- iii. Shall arrange for exhibits from area Kiwanis projects ~~(i.e. Pediatric Shock-Trauma Unit)~~
- ~~iv. An award shall be presented to the District Committee Chairperson or Club displaying the best exhibit. The Governor and Governor Elect shall select the best exhibit.~~
- ~~v.~~ iv. Shall develop an exhibit floor plan and finalize all exhibits with the Meeting Chairperson.
- ~~vi.~~ v. Shall arrange for exhibit set-up early Friday, labeling the space for each exhibitor.
- ~~vii.~~ vi. Shall staff the exhibit area on Friday to assist exhibitors in their set-up and in their break-down on Saturday afternoon.
- ~~viii.~~ vii. No direct or indirect appeal for funds for any purpose shall be made during that ~~period of time~~ period that any educational session or other general meeting of the Capital District is being held, unless the appeal is for the Capital District purposes approved by the Capital District Board of Trustees. If, however, any member of the Capital District desires to present an idea for club fund raising, or to offer a unique product, that person or organization may submit a detailed description of their proposal to the Executive Director ~~Capital District Fundraising Chairperson~~, not later than sixty (60) days prior to the date of the event at which the

presentation or offering is to be made. If the Chairperson so elects, he/she may authorize booth space for such purpose in the exhibit area at the given Meeting if approved.

ix-viii. Shall organize a Convention Office at the Meeting in consultation with the Meeting Chairperson and Executive Director. ~~It should be adjacent to the Registration Desk.~~ The ~~Office Center~~ should be equipped with all the necessary equipment and supplies for registration, items of local interest, and a bulletin board for posting notices. It is generally an office area for the Meeting Chairperson, the Registration Chairperson and his/her assistants, Exhibit Chairperson and the Stage Manager~~Physical Arrangements Chairperson.~~



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CAPITAL DISTRICT

Capital District, Kiwanis International

August 2025 Board of Trustees Meeting

Agenda Point – Revise Past Lt. Governor's Committee

### **Background**

Capital District has a Past Lt. Governor's committee as a part of the district committee structure for a number of years. In the past, the Past Lt. Governors operated as an association outside of the committee structure and had a set of officers and raised funds for its operations including recognizing past Lt. Governors. However, recent practice has been to have the committee led by a past Lt. Governor appointed by the Governor, consistent with the other district committees. The District Governor has requested that the District Committee description be updated to reflect current practice and abolish the Past Lt. Governors Association .

### **RECOMMENDATION**

The committee recommends that Appendix C – District Committee Descriptions be modified as follows:

#### **Past Lt. Governors**

**Chairperson:** ~~At the District Convention, the Committee shall elect one (1) of its members as Chairperson. Should the chairperson be unable to complete the term,~~ the Governor will appoint a past Lt. Governor member of the Committee to serve as ~~acting~~ chairperson ~~until the next regular or called meeting of the Committee.~~

**Membership:** All Past Lt. Governors of a Division in any Kiwanis District are members of the Committee as long as they are members in good standing of a Capital District Kiwanis Club. Members of the Past Lt. Governors Committee are encouraged to establish Division Past Lt. Governor ~~committees~~ ~~Associations~~ to serve as senior advisors to Division Lt. Governor.

**Duties:** The Committee functions as an advisor to the District Governor and District Board. Specific duties include:

1. Consider and report to the Governor and District Board its conclusions on matters referred to it. The Committee, or appropriately constituted sub-committees, may initiate studies and discussions on subjects of interest to the District and report their conclusions and recommendations to each member of the Committee, District Governor, and Executive Director.

~~2. Establish regional sub-committees that have the specific responsibility of advising the Governor-Elect on District Committee assignments to Club Support Committee~~

~~3. Adopt rules and procedures for the conduct of the association (since the Committee also functions as an association of Past Lt. Governors), provided that rules and procedures do not conflict with the District Bylaws or Policy Statements.~~

24. The District Committee shall meet at District Convention and may hold other meetings at the



call of the Chairperson.

**Operational Impact**

The new process will bring the committee structure and appointment process to be similar to the appointment of other district committees.

If approved by the Board, the Executive Director will modify and publish a revised policy code.

**Financial Impact**

None.

Respectfully submitted,

David Lurie  
Chair, Bylaws and Policy Committee  
Capital District Kiwanis



**Kiwanis**  
CAPITAL DISTRICT

Capital District, Kiwanis International  
August 2025 Board of Trustees Meeting  
Agenda Point – Reimbursement Policy for  
Executive Director

### **Background**

During the 2023-24 audit of Capital District's finances, the auditor noted that the district lacked a policy or internal control for how reimbursements requested by the Executive Director were reviewed and approved. Current district policy does not specify a process for voucher requests requested by the Executive Director prior to payment. Since it would be inappropriate to have the Executive Director approve their own funding requests, a procedure is needed to have another officer reviews and approve those expenses. The committee checked with Capital District Kiwanis Foundation on their process for the Foundation Treasurer's requests for expense reimbursement and found that another officer, the Executive Secretary, reviews the requests and signs any checks. Since Capital District Kiwanis uses electronic reimbursement for expense requests, there is a need for process for another officer to review and approve the requests prior to the issuance of funds.

### **RECOMMENDATION**

The committee recommends that a new Section 11(C)f be created as follows:

- f. Executive Director.** Before the Executive Director can receive reimbursement for any expenses, they shall be required to be submit their voucher requests to the District Governor for review and approval. The Governor must receive all requests for reimbursement to the Executive Director by September 28th for the current Kiwanis administrative year.

### **Operational Impact**

The new process will resolve a gap in the handling the district finances and ensure there is a check and balance in place to review the expenses of the Executive Director. The Executive Director should also modify or create the district reimbursement form for use by the Executive Director so that requests are routed to the District Governor for review/approval prior to issuance of funds.

If approved by the Board, the Executive Director will modify and publish a revised policy code.

### **Financial Impact**

None.

Respectfully submitted,

David Lurie  
Chair, Bylaws and Policy Committee  
Capital District Kiwanis



**Kiwanis**<sup>®</sup>  
CAPITAL DISTRICT

Capital District, Kiwanis International  
Board of Trustees Meeting  
August 22, 2025 - Agenda Point  
Kiwanis Voices Dues

## **Background**

The Kiwanis International Board has approved Kiwanis Voices as a 5-year pilot program with a dues amount of \$40 per member. The intention by Kiwanis International is to collect the dues and return those funds to the club in two years to be used for service project expenses.

Districts MAY withhold up to \$8 per member of the \$40 collected as district dues at their discretion.

Capital District Kiwanis Bylaws Article 10 states:

*Section 1. Each club shall pay dues to the district for each active club member in an amount determined by a two-thirds (2/3) vote of the district House of Delegates. Dues shall be based on each club's annual membership report to Kiwanis International as of September 30 of each year and shall be due annually on October 1 and payable by November 30.*

*Section 2. If a Kiwanis club member was a former member of a Kiwanis International Service Leadership Programs club, the member's club is not obligated to pay district dues for any such club member for a period of two (2) administrative years from the date of joining their first Kiwanis club.*

Our bylaws waive District dues for former SLP members which is the same age demographic targeted by Kiwanis Voices (18-26), but our bylaws also require that we charge district dues to all clubs.

Kiwanis Voices is part of a pilot program, so it's not exactly the same as existing Kiwanis Clubs and this leaves a gray area in our bylaws.

The District Board needs to decide if they want to charge district dues to Kiwanis Voices clubs and if not, we need to adopt a resolution to be passed by the 2025 House of Delegates to get their permission to not do so.

If the District Board does want to collect district dues, there needs to be board action to override district policy Section 33 that requires that all fees collected when building a new club flow through the District Office. This procedure would not work for Kiwanis Voices clubs due to the nature of the return of dues money by Kiwanis International.

### **Required Board Action**

**Option 1:** If the District Board decides that district dues shall not be collected for Kiwanis Voices clubs, adopt the following resolution to be brought before the 2025 House of Delegates:

*WHEREAS, Kiwanis Voices is a new kind of Kiwanis club – designated for young adults ages 18 to 26 who are starting or continuing their journey in the Kiwanis family, and*

*WHEREAS, Kiwanis Voices bridges the gap between youth programs and traditional Kiwanis clubs, helping members stay connected with peers while making a difference, and*

*WHEREAS, Members work together to build stronger communities. After two years, dues are returned to the club to support local and global causes the members choose, and*

*WHEREAS, Kiwanis Voices is a five-year global pilot program approved by the Kiwanis International Board (Article 4, Section 3, KI Bylaws), and*

*WHEREAS, Annual Kiwanis Voices member dues are \$40USD, but Member dues are held by Kiwanis International and returned to the club after two years to support the club's service projects,*

*THEREFORE, BE IT RESOLVED, that the Capital District waives any Capital District dues for a Kiwanis Voices Club for the five (5) year duration of the Pilot Program or until such time as Kiwanis International terminates the Pilot Program.*

*RESOLUTION Adopted by the Delegate Body of the 2025 Capital District House of Delegates on August 23, 2025.*

**Option 2:** If the District Board decides that district dues shall be collected for Kiwanis Voices clubs, adopt the following proviso to be added to Section 33 of our District Policy Statements:

*D. PROVISIO: All fees collected for new Kiwanis Voices clubs will go directly to Kiwanis International bypassing this process. A portion of the fees collected by KI will be returned to the Capital District as dues and the remainder will be returned by KI to the club in two years from its chartering to be used for local service projects. This provision will remain in effect for the five (5) year duration of the Kiwanis Voices Pilot Program or until such time as Kiwanis International terminates the Pilot Program.*

## **Financial Impact**

Kiwanis International requires that Capital District build one (1) new Kiwanis Voices club in the 2025-26 administrative year as a result of our district membership being below 4000 members.

Assuming that club is built, the financial impact of waiving district dues amounts to only \$120 (15 members at \$8). Part of the funds allocated to the 2025-26 Membership Committee will be devoted to building a new Kiwanis Voices club, so regardless of whether we waive dues or not, the investment we make in building the new club will outweigh the collection of the minimal district dues at stake.

Respectfully Submitted,

A handwritten signature in black ink, reading "Jeffrey Wolff". The signature is written in a cursive, flowing style.

Jeffrey M. Wolff  
Executive Director

**CAPITAL DISTRICT OF KIWANIS INTERNATIONAL, INC.**

Reviewed Financial Statements

For the Year Ended September 30, 2024

## **CAPITAL DISTRICT OF KIWANIS INTERNATIONAL, INC.**

### **BOARD OF TRUSTEES**

Eric Lamb	Governor
Josh Hiscock	Governor – Elect
Jeffrey Wolff	Secretary – Treasurer/ Executive Director
Jen Wolff	Immediate Past Governor
Timothy Gillette	Vice Governor
Roger Diehl	Blue Ridge Trustee
Charles Marks	DelMar Trustee
Jamie Moore	Heart of Virginia Trustee
Marie Bowe-Quick	National Capital Trustee
Richard Pippin	Southeast Trustee
Robert Lewit	Southwest Trustee
Nathaniel Kyle	West Virginia Trustee

# CAPITAL DISTRICT OF KIWANIS INTERNATIONAL, INC.

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## INDEPENDENT ACCOUNTANT'S REVIEW REPORT

To the Board of Trustees of  
Capital District of Kiwanis International, Inc.

We have reviewed the accompanying financial statements of Capital District of Kiwanis International, Inc. (a nonprofit organization), which comprise the statement of assets, liabilities, and net assets – modified cash basis as of September 30, 2024, and the related statements of revenues, expenses, and other changes in net assets – modified cash basis; functional expenses – modified cash basis; and cash flows – modified cash basis for the year then ended, and the related notes to the financial statements. A review includes primarily applying analytical procedures to management's financial data and making inquiries of management. A review is substantially less in scope than an audit, the objective of which is the expression of an opinion regarding the financial statements as a whole. Accordingly, we do not express such an opinion.

### **Management's Responsibility for the Financial Statements**

Management is responsible for the preparation and fair presentation of these financial statements in accordance with the modified cash basis of accounting; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of the financial statements that are free from material misstatement whether due to fraud or error.

### **Accountant's Responsibility**

Our responsibility is to conduct the review engagement in accordance with Statements on Standards for Accounting and Review Services promulgated by the Accounting and Review Services Committee of the American Institute of Certified Public Accountants. Those standards require us to perform procedures to obtain limited assurance as a basis for reporting whether we are aware of any material modifications that should be made to the financial statements for them to be in accordance with the modified cash basis of accounting. We believe that the results of our procedures provide a reasonable basis for our conclusion.

We are required to be independent of Capital District of Kiwanis International, Inc. and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements related to our review.

### **Accountant's Conclusion**

Based on our review, we are not aware of any material modifications that should be made to the accompanying financial statements in order for them to be in accordance with the modified cash basis of accounting.

### **Basis of Accounting**

We draw attention to Note 1 of the financial statements, which describes the basis of accounting. The financial statements are prepared on the modified cash basis of accounting, which is a basis of accounting other than accounting principles generally accepted in the United States of America. Our conclusion is not modified with respect to this matter.

**Supplementary Information**

The supplementary information included on pages 10 to 13 is presented for purposes of additional analysis and is not a required part of the basic financial statements. Such information is the responsibility of management and was derived from, and relates directly to, the underlying accounting and other records used to prepare the financial statements. The supplementary information has been subjected to the review procedures applied in our review of the basic financial statements. We are not aware of any material modifications that should be made to the supplementary information. We have not audited the supplementary information and do not express an opinion on such information.

*Didawick & Company, P.C.*

Staunton, Virginia

July 17, 2025

## **BASIC FINANCIAL STATEMENTS**

**CAPITAL DISTRICT OF KIWANIS INTERNATIONAL, INC.**  
**Statement of Assets, Liabilities, and Net Assets - Modified Cash Basis**  
**As of September 30, 2024**

**ASSETS**

Current assets:

Cash and cash equivalents	\$ 132,510
Total current assets	<u>132,510</u>

Other assets:

Investments	<u>1,063,135</u>
Total other assets	<u>1,063,135</u>

Total assets	<u><u>\$ 1,195,645</u></u>
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**LIABILITIES AND NET ASSETS**

Current liabilities:

Accounts payable	\$ 1,152
Total current liabilities	<u>1,152</u>

Total liabilities	<u>1,152</u>
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Net assets:

Without donor restrictions	
Undesignated	1,142,204
Board designated	<u>52,289</u>

Total net assets	<u>1,194,493</u>
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Total liabilities and net assets	<u><u>\$ 1,195,645</u></u>
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See accompanying notes and accountant's review report.

**CAPITAL DISTRICT OF KIWANIS INTERNATIONAL, INC.**  
**Statement of Revenues, Expenses, and Other Changes in Net Assets -**  
**Modified Cash Basis**  
**Year Ended September 30, 2024**

	<u>Without Donor Restrictions</u>
<b>REVENUES, GAINS AND OTHER SUPPORT:</b>	
Membership dues	\$ 176,990
Conferences and events	217,986
Grants	11,174
Donations	1,375
Investment income, net	185,814
Other income	<u>11,638</u>
Total revenues, gains and other support	<u>604,977</u>
<b>EXPENSES:</b>	
Program services:	
Administration of District Clubs	392,880
Supporting services:	
General and administration	<u>34,883</u>
Total expenses	<u>427,763</u>
Change in net assets	177,214
Net assets at beginning of year	<u>1,017,279</u>
Net assets at end of year	<u><u>\$ 1,194,493</u></u>

See accompanying notes and accountant's review report.

**CAPITAL DISTRICT OF KIWANIS INTERNATIONAL, INC.**  
**Statement of Functional Expenses - Modified Cash Basis**  
**Year Ended September 30, 2024**

	<u>Program Services</u>	<u>Supporting Services</u>	
	Administration of	General and	
	District Clubs	Administration	Total
Advertising	\$ 12,000	\$ -	\$ 12,000
Awards and certificates	14,168	-	14,168
Conferences and meetings	55,317	-	55,317
Contract services	20,400	20,400	40,800
Insurance	-	800	800
Office expenses	-	6,934	6,934
Professional services	-	5,549	5,549
Services Leadership Programs	15,505	-	15,505
Telephone and internet	-	1,200	1,200
Travel expenses	<u>275,490</u>	<u>-</u>	<u>275,490</u>
Total other operating expenses	<u>392,880</u>	<u>34,883</u>	<u>427,763</u>
 Total operating expenses	 <u>\$ 392,880</u>	 <u>\$ 34,883</u>	 <u>\$ 427,763</u>

See accompanying notes and accountant's review report.

**CAPITAL DISTRICT OF KIWANIS INTERNATIONAL, INC.**  
**Statement of Cash Flows - Modified Cash Basis**  
**Year Ended September 30, 2024**

**Cash flows from operating activities:**

Change in net assets	\$ 177,214
Adjustments to reconcile change in net assets to net cash provided by (used for) operating activities:	
Net investment income, reinvested	(186,146)
Increase (decrease) in accounts payable	<u>(848)</u>
Net cash provided by (used for) operating activities	<u>(9,780)</u>

**Cash flows from investing activities:**

Net transfers from investment accounts	<u>10,000</u>
Net cash provided by (used for) investing activities	<u>10,000</u>
Net decrease in cash and cash equivalents	220
Cash and cash equivalents, beginning of year	<u>132,290</u>
Cash and cash equivalents, end of year	<u><u>\$ 132,510</u></u>

See accompanying notes and accountant's review report.

**CAPITAL DISTRICT OF KIWANIS INTERNATIONAL, INC.**  
**Notes to Financial Statements**  
**September 30, 2024**

**1. ORGANIZATION AND SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES**

**A. Reporting Entity**

Capital District of Kiwanis International, Inc. (Capital District Kiwanis) is a private, not-for-profit organization that was established on August 29, 1918 primarily to assist Kiwanis International in building new clubs and strengthening existing clubs; delivering education to clubs; and delivering service leadership programs and global campaign for children programming to and through clubs. Capital District of Kiwanis International, Inc. is the administrative office for more than 140 Kiwanis clubs located within the geographic confines of Delaware, Maryland, Virginia, West Virginia, and the District of Columbia. The Organization is supported primarily through annual conferences and club membership dues.

Effective October 1, 2021, Capital District Kiwanis absorbed the Capital District Circle K and Capital District Key Club programs. Capital District Circle K International is the collegiate arm of Kiwanis which enables campus and community clubs to serve effectively through the creation of service opportunities, developing student leaders, and facilitating fellowship among members. Capital District Key Club is an extension of Key Club International, which allows high-school students to serve in their communities. The Key Club includes a student-led board that facilitates service and activity throughout the year. The focus of Key Club much like Circle K is to develop leadership, initiative, and service.

**B. Basis of Accounting and Financial Statement Presentation**

For the year ended September 30, 2024, Capital District Kiwanis has prepared its financial statements in accordance with the cash basis of accounting for not-for-profit entities with modifications made for investments, prepaid expenses, accounts payable and payroll withholdings. Consequently, revenues are recognized when received rather than when earned and expenses are recognized when incurred. Under this guidance, Capital District Kiwanis is required to report information regarding its financial position and activities according to two classes of net assets: without donor restrictions and with donor restrictions.

Without donor restrictions – Net assets that are not subject to donor-imposed stipulations. Net assets without donor restrictions may be designated for specific purposes by action of the Board of Directors or may otherwise be limited by contractual agreements with outside parties.

With donor restrictions – Net assets subject to donor-imposed stipulations that may be temporary- or permanent-in-nature. Stipulations that are temporary-in-nature expire either by passage of time or fulfillment by action of Capital District Kiwanis. Stipulations that are permanent-in-nature require amounts to be held in perpetuity.

**C. Use of Estimates**

The preparation of financial statements in conformity with the modified cash basis of accounting requires management to make certain estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements and the reported amounts of revenues, expenses, gains, losses and other changes in net assets during the reporting period. Actual results could differ from those estimates.

**D. Cash and Cash Equivalents**

For purposes of the statement of cash flows - modified cash basis, Capital District Kiwanis considers cash in bank accounts, cash on hand, and all highly liquid investments purchased with original maturities of three months or less to be cash and cash equivalents.

**E. Functional Allocation of Expenses**

The costs of providing Capital District Kiwanis' program and supporting services have been summarized on a functional basis in the statement of revenues, expenses, and other changes in net assets - modified cash basis. Accordingly, certain costs have been allocated between the program and supporting services benefited.



**CAPITAL DISTRICT OF KIWANIS INTERNATIONAL, INC.**  
**Notes to Financial Statements**  
**September 30, 2024**

**1. ORGANIZATION AND SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONT'D)**

**F. Membership Dues Revenue**

Membership dues are charged to district clubs on a per member basis based on the number of club members as of October 1 or prorated for partial-year membership. Dues are collected by Kiwanis International and remitted to Capital District Kiwanis. Annual club dues that are not received by Kiwanis International prior to the end of the fiscal year are not accrued by Capital District Kiwanis because the charter of these clubs is likely to be revoked. Therefore, dues are recognized as revenue when received by Capital District Kiwanis.

**G. Income Tax Status**

Capital District Kiwanis is exempt from federal income taxes under Section 501(c)(4) of the Internal Revenue Code and has been classified as an organization that is not a private foundation under Section 509(a) of the Internal Revenue Code. Accordingly, no provision is made for income tax in the financial statements. Generally, federal, state, and local authorities may examine Capital District Kiwanis' tax returns for three years from the date of filing or the due date of the return, whichever is later.

**H. Advertising**

Capital District Kiwanis expenses all advertising costs as they are incurred. Advertising costs for fiscal year 2024 totaled \$12,000.

**2. CONCENTRATIONS OF CREDIT RISK**

Capital District Kiwanis maintains cash balances in one financial institution. The balances are insured by the Federal Deposit Insurance Corporation up to \$250,000 per institution. As of September 30, 2024, there were no uninsured cash balances.

**3. INVESTMENTS**

The following schedule summarizes the total return on investments for the year ended September 30, 2024:

Fair market value – October 1, 2023	\$ 886,989
Net cash withdrawn from investments	(10,000)
Dividend and interest income, reinvested	25,673
Realized and unrealized gain/(loss), reinvested	169,877
Investment expenses	(9,404)
Fair market value – September 30, 2024	<u>\$ 1,063,135</u>

**4. FAIR VALUE MEASUREMENTS**

Capital District Kiwanis applies generally accepted accounting principles for fair value measurements of financial assets that are recognized or disclosed at fair value in the financial statements on a recurring basis. GAAP establishes a fair value hierarchy that prioritizes the inputs to valuation techniques used to measure fair value. The hierarchy gives the highest priority to unadjusted quoted prices in active markets for identical assets or liabilities (Level 1 measurements) and the lowest priority to measurements involving significant unobservable inputs (Level 3 measurements). The three levels of the fair value hierarchy are as follows:

- Level 1 inputs are quoted prices (unadjusted) in active markets for identical assets or liabilities that the organization has the ability to access at the measurement date.
- Level 2 inputs are inputs other than quoted prices included within Level 1 that are observable for the asset or liability, either directly or indirectly. Investments in this category include equity securities that are not actively traded.
- Level 3 inputs are unobservable inputs for the asset or liability.

**CAPITAL DISTRICT OF KIWANIS INTERNATIONAL, INC.**  
**Notes to Financial Statements**  
**September 30, 2024**

**4. FAIR VALUE MEASUREMENTS (CONT'D)**

The level in the fair value hierarchy within which a fair measurement in its entirety falls is based on the lowest level input that is significant to the fair value measurement in its entirety. The fair values measurements and levels within the fair value hierarchy of those measurements for the assets reported at fair value on a recurring basis as of September 30, 2024 are as follows:

Investments	Fair Value at September 30, 2024	Quoted Prices in Active Markets for Identical Assets (Level 1)
Exchange traded funds	\$ 427,221	\$ 427,221
Stocks	417,541	417,541
Fixed income	82,948	82,948
Government securities	135,425	135,425
Total investments	<u>\$ 1,063,135</u>	<u>\$ 1,063,135</u>

**5. LIQUIDITY MANAGEMENT**

Capital District of Kiwanis International, Inc. has \$1,195,645 of financial assets available within one year of the date of the statement of revenues, expenses, and other changes in net assets - modified cash basis to meet cash needs for general expenditure, consisting of cash and equivalents of \$132,510, and investments of \$1,063,135. None of these financial assets are subject to donor-imposed stipulations or other contractual restrictions that make them unavailable for general expenditure within one year of the date of the statement of revenues, expenses, and other changes in net assets - modified cash basis. Capital District Kiwanis has a policy to structure its financial assets to be available as its general expenditures, liabilities and other obligations come due.

**6. GOVERNING BOARD DESIGNATIONS**

Capital District Kiwanis has a policy requiring funds be retained in reserve in an amount equal to 1.0 times the current annual operating budget, less budgeted revenue from self-supporting events. Management has established a separate cash account to manage these reserve funds. These board designated funds are shown separate from undesignated net assets in the statement of financial position and totaled \$52,289 as of September 30, 2024.

**7. SUBSEQUENT EVENTS**

Capital District Kiwanis did not have any subsequent events requiring recordation or disclosure in the financial statements through July 17, 2025, which is the date the financial statements were available to be issued.

## **SUPPLEMENTARY INFORMATION**

**CAPITAL DISTRICT OF KIWANIS INTERNATIONAL, INC.**  
**Statement of Assets, Liabilities, and Net Assets by Program - Modified Cash Basis**  
**As of September 30, 2024**

	KIWANIS	KEY CLUB	CIRCLE K	TOTAL
<b>ASSETS</b>				
Current assets:				
Cash and cash equivalents	\$ 82,949	\$ 17,640	\$ 31,921	\$ 132,510
Total current assets	<u>82,949</u>	<u>17,640</u>	<u>31,921</u>	<u>132,510</u>
Other assets:				
Investments	873,290	189,845	-	1,063,135
Total other assets	<u>873,290</u>	<u>189,845</u>	<u>-</u>	<u>1,063,135</u>
Total assets	<u>\$ 956,239</u>	<u>\$ 207,485</u>	<u>\$ 31,921</u>	<u>\$ 1,195,645</u>
<b>LIABILITIES AND NET ASSETS</b>				
Current liabilities:				
Accounts payable	\$ 1,152	\$ -	\$ -	\$ 1,152
Total current liabilities	<u>1,152</u>	<u>-</u>	<u>-</u>	<u>1,152</u>
Total liabilities	<u>1,152</u>	<u>-</u>	<u>-</u>	<u>1,152</u>
Net assets:				
Without donor restrictions				
Undesignated	902,798	207,485	31,921	1,142,204
Board designated	<u>52,289</u>	<u>-</u>	<u>-</u>	<u>52,289</u>
Total net assets	<u>955,087</u>	<u>207,485</u>	<u>31,921</u>	<u>1,194,493</u>
Total liabilities and net assets	<u>\$ 956,239</u>	<u>\$ 207,485</u>	<u>\$ 31,921</u>	<u>\$ 1,195,645</u>

See accompanying notes and accountant's review report.

**CAPITAL DISTRICT OF KIWANIS INTERNATIONAL, INC.**  
**Statement of Revenues, Expenses, and Other Changes in Net Assets by Program - Modified Cash Basis**  
**Year Ended September 30, 2024**

	KIWANIS	KEY CLUB	CIRCLE K	TOTAL
<b>REVENUES, GAINS AND OTHER SUPPORT:</b>				
Membership dues	\$ 135,659	39,041	2,290	\$ 176,990
Conferences and events	100,280	116,060	1,646	217,986
Grants	11,174	-	-	11,174
Donations	-	1,200	175	1,375
Investment income, net	150,853	34,958	3	185,814
Other Income	1	11,637	-	11,638
Total revenues, gains and other support	<u>397,967</u>	<u>202,896</u>	<u>4,114</u>	<u>604,977</u>
<b>EXPENSES:</b>				
Program services:				
Administration of District Clubs	222,980	164,782	5,118	392,880
Supporting services:				
General and administration	<u>33,172</u>	<u>1,436</u>	<u>275</u>	<u>34,883</u>
Total expenses	<u>256,152</u>	<u>166,218</u>	<u>5,393</u>	<u>427,763</u>
Change in net assets	141,815	36,678	(1,279)	177,214
Net assets at beginning of year	<u>813,272</u>	<u>170,807</u>	<u>33,200</u>	<u>1,017,279</u>
Net assets at end of year	<u>\$ 955,087</u>	<u>\$ 207,485</u>	<u>\$ 31,921</u>	<u>\$ 1,194,493</u>

See accompanying notes and accountant's review report.

**CAPITAL DISTRICT OF KIWANIS INTERNATIONAL, INC.**  
**Statement of Functional Expenses by Program - Modified Cash Basis**  
**Year Ended September 30, 2023**

	Program Services			Supporting Services			Total
	Administration of District Clubs			General and Administration			
	KIWANIS	KEY CLUB	CIRCLE K	KIWANIS	KEY CLUB	CIRCLE K	
Advertising	12,000	-	-	-	-	-	12,000
Awards and certificates	12,155	2,013	-	-	-	-	14,168
Conferences and meetings	24,639	30,519	159	-	-	-	55,317
Contract services	20,400	-	-	20,400	-	-	40,800
Insurance	-	-	-	800	-	-	800
Office expenses	-	-	-	5,223	1,436	275	6,934
Professional services	-	-	-	5,549	-	-	5,549
Services Leadership Programs	8,671	6,834	-	-	-	-	15,505
Telephone and internet	-	-	-	1,200	-	-	1,200
Travel Expenses	145,115	125,416	4,959	-	-	-	275,490
Total other operating expenses	222,980	164,782	5,118	33,172	1,436	275	427,763
Total operating expenses	\$ 222,980	\$ 164,782	\$ 5,118	\$ 33,172	\$ 1,436	\$ 275	\$ 427,763

See accompanying notes and accountant's review report.

**CAPITAL DISTRICT OF KIWANIS INTERNATIONAL, INC.**  
**Statement of Cash Flows by Program - Modified Cash Basis**  
**Year Ended September 30, 2023**

	<u>KIWANIS</u>	<u>KEY CLUB</u>	<u>CIRCLE K</u>	<u>TOTAL</u>
<b>Cash flows from operating activities:</b>				
Change in net assets	\$ 141,815	\$ 36,678	\$ (1,279)	\$ 177,214
Adjustments to reconcile change in net assets to net cash provided by (used for) operating activities:				
Net investment income, reinvested	(151,264)	(34,882)	-	(186,146)
Increase (decrease) in accounts payable	<u>(848)</u>	<u>-</u>	<u>-</u>	<u>(848)</u>
Net cash provided by (used for) operating activities	<u>(10,297)</u>	<u>1,796</u>	<u>(1,279)</u>	<u>(9,780)</u>
<b>Cash flows from investing activities:</b>				
Net transfers to investment accounts	<u>10,000</u>	<u>-</u>	<u>-</u>	<u>10,000</u>
Net cash provided by (used in) investing activities	<u>10,000</u>	<u>-</u>	<u>-</u>	<u>10,000</u>
Net increase (decrease) in cash and cash equivalents	(297)	1,796	(1,279)	220
Cash and cash equivalents, beginning of year	<u>83,246</u>	<u>15,844</u>	<u>33,200</u>	<u>132,290</u>
Cash and cash equivalents, end of year	<u>\$ 82,949</u>	<u>\$ 17,640</u>	<u>\$ 31,921</u>	<u>\$ 132,510</u>

See accompanying notes and accountant's review report.



Jeffrey Wolff &lt;jmwolff@gmail.com&gt;

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**Acceptance notification for your 2023 electronically filed tax return**

1 message

---

**efile@efileservices.net** <efile@efileservices.net>  
To: jeffrey.wolff@capitalkiwanis.org

Thu, Jul 24, 2025 at 5:03 PM

**DIDAWICK & COMPANY, P.C.  
P.O. BOX 2976  
STAUNTON, VA 24402  
540-885-0855**

CAPITAL DISTRICT OF KIWANIS  
INTERNATIONAL, INC.

Dear :

Your federal exempt organization return was filed electronically with the IRS on July 24th 2025 4:42pm ET and accepted on July 24th 2025. The IRS assigned tracking number for this return is 54474920252050031897.

**If You Need to Make a Change to Your Return**

If you need to make a change or correct the return you filed electronically, you may contact this office at 540-885-0855 regarding filing an amended return.

To contact us regarding this message, please call us at 540-885-0855 or email us at [david@didawick.com](mailto:david@didawick.com).

Thank you for the opportunity to serve you.

Sincerely,

DIDAWICK & COMPANY, P.C.

This electronic mail message contains confidential and legally privileged information intended only for the use of the recipient. If the reader of this message is not the intended recipient, the reader is hereby notified that any dissemination, distribution, copying or other use of this message is strictly prohibited and is hereby instructed to notify the sender immediately by return email and destroy this copy of this message.



**CAPITAL DISTRICT KIWANIS FOUNDATION**

**FINANCIAL STATEMENTS**

**FOR THE YEAR ENDED SEPTEMBER 30, 2024**  
**(With Comparative Totals for the Year Ended September 30, 2023)**

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## **INDEPENDENT AUDITOR'S REPORT**

To the Board of Directors  
Capital District Kiwanis Foundation  
Haymarket, Virginia

### **Opinion**

We have audited the accompanying financial statements of the Capital District Kiwanis Foundation (a non-profit organization), which comprise the statement of financial position as of September 30, 2024, the related statements of activities, functional expenses, and cash flows for the year then ended, and the related notes to the financial statements.

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of the Capital District Kiwanis Foundation as of September 30, 2024 and the changes in its net assets and its cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.

### **Basis for Opinion**

We conducted our audit in accordance with auditing standards generally accepted in the United States of America. Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of the Capital District Kiwanis Foundation and to meet our other ethical responsibilities in accordance with the relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

### **Responsibilities of Management for the Financial Statements**

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America, and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the Capital District Kiwanis Foundation's ability to continue as a going concern within one year after the date that the financial statements are available to be issued.

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## **Auditor's Responsibilities for the Audit of the Financial Statements**

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with generally accepted auditing standards will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

In performing an audit in accordance with generally accepted auditing standards, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Capital District Kiwanis Foundation's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about the Capital District Kiwanis Foundation's ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control related matters that we identified during the audit.

## **Report on Summarized Comparative Information**

We have previously audited Capital District Kiwanis Foundation's 2023 financial statements, and we expressed an unmodified audit opinion on those audited financial statements in our report dated July 19, 2024. In our opinion, the summarized comparative information presented herein as of and for the year ended September 30, 2023 is consistent, in all material respects, with the audited financial statements from which it has been derived.

*Isoti, Alynn, Louisa & Company, P. C.*

Roanoke, Virginia  
January 28, 2025

**CAPITAL DISTRICT KIWANIS FOUNDATION**

**STATEMENT OF FINANCIAL POSITION**

**SEPTEMBER 30, 2024**

**(With Comparative Totals as of September 30, 2023)**

	<u>2024</u>	<u>2023</u>
ASSETS:		
Cash	\$ 25,089	\$ 16,575
Investments	<u>1,581,097</u>	<u>1,313,843</u>
Total assets	<u>\$ 1,606,186</u>	<u>\$ 1,330,418</u>
NET ASSETS:		
Without donor restrictions:		
Undesignated	\$ 947,202	\$ 683,189
Board designated	<u>77,454</u>	<u>68,054</u>
Total without donor restrictions	1,024,656	751,243
With donor restrictions	<u>581,530</u>	<u>579,175</u>
Total net assets	<u>\$ 1,606,186</u>	<u>\$ 1,330,418</u>

**See accompanying auditor's report and notes to the financial statements.**

# CAPITAL DISTRICT KIWANIS FOUNDATION

## STATEMENT OF ACTIVITIES

YEAR ENDED SEPTEMBER 30, 2024

(With Comparative Totals for the Year Ended September 30, 2023)

	Without Donor Restrictions	With Donor Restrictions	2024 Total	2023 Total
<b>SUPPORT AND REVENUE:</b>				
Contributions and grants	\$ 32,891	\$ 2,355	\$ 35,246	\$ 16,620
Interest and dividends, net	38,227	-	38,227	36,761
Realized gains on investments, net	62,943	-	62,943	22,908
Unrealized gains on investments, net	213,178	-	213,178	74,325
Special events	30,651	-	30,651	32,583
Total support and revenue	377,890	2,355	380,245	183,197
<b>EXPENSES:</b>				
Program services:				
Scholarships and grants	83,848	-	83,848	85,539
Other program expenses	7,040	-	7,040	4,671
Total program services	90,888	-	90,888	90,210
Supporting services:				
Management and general	7,040	-	7,040	4,671
Fundraising	6,549	-	6,549	5,758
Total supporting services	13,589	-	13,589	10,429
Total expenses	104,477	-	104,477	100,639
 INCREASE IN NET ASSETS	 273,413	 2,355	 275,768	 82,558
NET ASSETS, BEGINNING	751,243	579,175	1,330,418	1,247,860
NET ASSETS, ENDING	\$ 1,024,656	\$ 581,530	\$ 1,606,186	\$ 1,330,418

See accompanying auditor's report and notes to the financial statements.

# CAPITAL DISTRICT KIWANIS FOUNDATION

## STATEMENT OF FUNCTIONAL EXPENSES

YEAR ENDED SEPTEMBER 30, 2024

(With Comparative Totals for the Year Ended September 30, 2023)

	Program Services			Supporting Services			2024	2023
	Scholarships and Grants	Other Program Expenses	Total Program Services	Management and General	Fundraising	Total Supporting Services	Total Expenses	Total Expenses
Direct program expenses:								
Pediatric trauma hospitals	\$ 44,000	\$ -	\$ 44,000	\$ -	\$ -	\$ -	\$ 44,000	\$ 33,000
Kiwanis children's fund	-	-	-	-	-	-	-	2,400
Kiwanis club grants	21,550	-	21,550	-	-	-	21,550	27,500
Service leadership program	14,298	-	14,298	-	-	-	14,298	17,737
Teenager of the year	2,500	-	2,500	-	-	-	2,500	2,764
Other program grants	1,500	-	1,500	-	-	-	1,500	2,138
Total direct program expenses	83,848	-	83,848	-	-	-	83,848	85,539
Special events	-	-	-	-	3,029	3,029	3,029	3,424
Bank fees	-	83	83	83	41	124	207	237
Legal and professional	-	6,753	6,753	6,753	3,377	10,130	16,883	10,790
Postage	-	64	64	65	32	97	161	240
Printing	-	26	26	27	13	40	66	97
Supplies	-	84	84	83	42	125	209	287
Taxes and licenses	-	30	30	29	15	44	74	25
Total expenses	\$ 83,848	\$ 7,040	\$ 90,888	\$ 7,040	\$ 6,549	\$ 13,589	\$ 104,477	\$ 100,639

See accompanying auditor's report and notes to the financial statements.

# CAPITAL DISTRICT KIWANIS FOUNDATION

## STATEMENT OF CASH FLOWS

YEAR ENDED SEPTEMBER 30, 2024

(With Comparative Totals for the Year Ended September 30, 2023)

	<u>2024</u>	<u>2023</u>
<b>CASH FLOWS FROM OPERATING ACTIVITIES:</b>		
Increase in net assets	\$ 275,768	\$ 82,558
Adjustments to reconcile increase in net assets to cash used in operating activities		
Realized gains on investments	(62,943)	(22,908)
Unrealized gains on investments	<u>(213,178)</u>	<u>(74,325)</u>
Net cash used in operating activities	<u>(353)</u>	<u>(14,675)</u>
<b>CASH FLOWS FROM INVESTING ACTIVITIES:</b>		
Reinvested interest and dividends, net	(38,227)	(36,761)
Proceeds from sale of investments	283,812	290,990
Purchases of investments	<u>(236,718)</u>	<u>(241,988)</u>
Net cash provided by investing activities	<u>8,867</u>	<u>12,241</u>
Net increase (decrease) in cash	8,514	(2,434)
<b>CASH:</b>		
Beginning	<u>16,575</u>	<u>19,009</u>
Ending	<u><u>\$ 25,089</u></u>	<u><u>\$ 16,575</u></u>

See accompanying auditor's report and notes to the financial statements.



# **CAPITAL DISTRICT KIWANIS FOUNDATION**

## **NOTES TO FINANCIAL STATEMENTS**

### **1. ORGANIZATION AND ACTIVITIES:**

#### Organization

The Capital District Kiwanis Foundation (the “Foundation”) was incorporated in the Commonwealth of Virginia in June 1973 as a nonprofit, non-stock corporation. The Foundation is dedicated to aiding and promoting community service through financial assistance to local district clubs; expending funds to care for, treat, and rehabilitate individuals with disabilities, particularly children experiencing trauma; and assisting Kiwanis’ sponsored youth activities with scholarships and grants. The Foundation works in partnership with Kiwanis International to make a difference in the lives of children every day through grants to local district clubs for community service projects, donations to pediatric centers, and support to deserving youth. The Foundation is governed by its board of directors in the Washington metropolitan area.

#### Activities

The Foundation awards grants to local districts to help local communities assist mothers in transitional housing, build playgrounds, feed children, support public library and school music programs, fund student leadership and after-school programs, and advance literacy projects. The Foundation also provides disaster relief assistance to help declared disaster areas recover. The Foundation also issues grants and assistance to pediatric trauma centers in the Washington metropolitan area. Additionally, the Foundation grants scholarship awards through local district Key Club and Circle K programs to deserving students.

### **2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES:**

#### Basis of Accounting

The accompanying financial statements have been prepared on the accrual basis of accounting in accordance with accounting principles generally accepted in the United States of America (“GAAP”). Under the accrual basis, support and revenue are recognized in the accounting period in which they are earned and become objectively measurable, while expenses are recognized in the accounting period in which the related liability is incurred.

#### Estimates

The preparation of the financial statements in conformity with GAAP requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities, the disclosure of contingent assets and liabilities at the date of the financial statements, and the reported amounts of support, revenue, income, gains, losses and expenses during the reporting period. Actual results could differ from those estimates and assumptions. The significant estimates used by the Foundation in preparing these financial statements are the fair value of investments and the functional allocation of expenses.

## CAPITAL DISTRICT KIWANIS FOUNDATION

### NOTES TO FINANCIAL STATEMENTS – (Continued)

#### 2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES – (Continued):

##### Financial Statement Presentation

The Foundation is required to report information regarding its financial position and activities based on the existence or absence of donor-imposed restrictions. Accordingly, the net assets of the Foundation and changes therein are classified and reported in two classes as follows:

*Net Assets Without Donor Restrictions* – Net assets that are available for use in general operations and not subject to donor restrictions. These net assets may be designated for specific purposes by action of the Board of Directors (the “Board”) or may otherwise be limited by contractual agreements with outside parties. Support, revenue, income, gains, and losses that are not classified as net assets with donor restrictions are included in this classification. Expenses are reported as decreases in this classification.

*Net Assets With Donor Restrictions* – Net assets that are subject to donor-imposed restrictions. Some donor restrictions are temporary in nature, such as those that will be met by the passage of time or that can be fulfilled by action of the Foundation. Other donor-imposed restrictions are perpetual in nature, where the donor stipulates the resources be maintained in perpetuity. Contributions and grants that are restricted by the donor or grantor are reported as increases in net assets with donor restrictions, if restrictions were not met in the year earned. When a restriction expires, the net assets are reclassified to net assets without donor restrictions and reported in the statement of activities as net assets released from restrictions.

##### Comparative Financial Information

The financial statements include certain prior year summarized comparative information in total but not by net asset class. Such information does not include sufficient detail to constitute a presentation in conformity with GAAP. Accordingly, such information should be read in conjunction with the Foundation’s financial statements as of and for the year ended September 30, 2023, from which the summarized information was derived.

## CAPITAL DISTRICT KIWANIS FOUNDATION

### NOTES TO FINANCIAL STATEMENTS – (Continued)

#### 2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES – (Continued):

##### Fair Value Measurements

The Foundation's investments are reported at fair value in the accompanying statement of financial position. The methods used to measure fair value may produce an amount that may not be indicative of net realizable value or reflective of future fair values. Furthermore, although the Foundation believes its valuation methods are appropriate and consistent with other market participants, the use of different methodologies or assumptions to determine the fair value of certain financial instruments could result in a different fair value measurement at the reporting date.

The fair value measurements accounting standards establishes a fair value hierarchy that prioritizes the inputs to valuation techniques used to measure fair value. This hierarchy consists of three broad levels:

- Level 1 inputs – consist of unadjusted quoted prices in active markets that are accessible at the measurement date for identical assets and have the highest priority.
- Level 2 inputs – consist of observable inputs other than quoted prices in active markets for identical assets that are observable either directly or indirectly.
- Level 3 inputs – consist of unobservable inputs in which there is little or no market data, which requires management to develop their own assumptions and have the lowest priority.

The Foundation uses appropriate valuation techniques based on the available inputs to measure the fair value of its investments. When available, the Foundation measures fair value using Level 1 inputs because they generally provide the most reliable evidence of fair value.

##### Investments

The Foundation records investments in equity securities with readily determinable fair values and all investments in debt securities at their fair values in the statement of financial position. Income and expense of the investment accounts are recognized when received or incurred, respectively. Investment expenses are netted against investment income and presented together as interest and dividends, net in the statement of activities. Realized gains and losses on investments are computed using an average cost method of cost determination. Purchases and sales of investments are recorded on the trade date. Donations of investments are recorded at their fair value (based upon quotations or appraisals) at the date of gift.

As part of the Foundation's investment strategy, money market funds are held within the investment portfolio with the intent of these amounts to be available for reinvestment elsewhere within the portfolio. According to the investment policy adopted by the Board, the Foundation may invest in various securities that are exposed to various interest rates; and economic, market and other credit risks. Due to the level of risk associated with certain investment securities, it is at least reasonably possible that changes in the value of investment securities will occur in the near term and any such changes may be material.

## CAPITAL DISTRICT KIWANIS FOUNDATION

### NOTES TO FINANCIAL STATEMENTS – (Continued)

#### 2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES – (Continued):

##### Revenue Recognition

The Foundation holds annual fundraising events to make the public aware of its charitable programs and to raise funds in support of certain charitable endeavors. Revenue and contributions earned from these events are recorded as special events in the statement of activities. The related revenue is recognized at the point in time when the event occurs, the service is performed, or the point of sale.

##### Contributions and Grants

Contributions and grants received are recorded as support without donor restrictions or support with donor restrictions depending on the existence and nature of any donor-imposed restrictions. It is the Foundation's policy to record donor restricted contributions whose restrictions are met in the same reporting period as support without donor restrictions. Contributions and grants that are restricted by the donor or grantor are reported as increases in net assets without donor restrictions if the restriction expires (that is, when a stipulated time restriction ends or purpose restriction is accomplished) in the reporting period in which the support is recognized. Contributions and grants restricted by the donor for specific purposes or designated for future periods are reported as support with donor restrictions in the period earned. When a restriction expires, that is, when a stipulated time restriction ends or purpose restriction is accomplished, net assets with donor restrictions are reclassified to net assets without donor restrictions and reported in the statement of activities as net assets released from restriction. Conditional contributions and grants are recognized when the barrier(s) to entitlement is(are) met.

##### In-Kind Donations and Contributed Services

Donated supplies and materials are reflected at their estimated fair value at the time of donation. Contributed services that create or enhance nonfinancial assets and require specialized skills are recognized at their estimated fair values when determinable and measurable. The Foundation receives contributed services from community volunteers and board members that are substantial to its operation but that do not meet the criteria for recognition in the accompanying financial statements. During both of the years ended September 30, 2024 and 2023, the Foundation reported no significant in-kind donations or contributed services.

##### Functional Allocation of Expenses

The costs of providing various programs and other activities have been summarized on a functional basis in the statement of functional expenses. Expenses that can be identified to a specific program or support service are charged directly to the related program or service according to their natural expenditure classification. Expenses that are common to several functions are allocated based on estimates made by the Foundation.

## CAPITAL DISTRICT KIWANIS FOUNDATION

### NOTES TO FINANCIAL STATEMENTS – (Continued)

#### 2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES – (Continued):

##### Income Taxes

The Foundation is an income tax-exempt organization under Section 501(c)(3) of the Internal Revenue Code and is not classified as a private foundation. The Foundation believes that it has appropriate support for any income tax positions taken, and as such, does not have any uncertain income tax positions that are required to be recorded in the financial statements.

There can be no assurances that the Foundation's income tax returns will not be challenged by the income taxing authorities and that the Foundation will not be subject to income taxes, penalties, and interest as a result of such a challenge. Should any such penalties and interest be incurred, the Foundation's policy is to recognize them as management and general expenses. With limited exceptions, the Foundation is no longer subject to income tax examinations for any years earlier than 2020 for federal purposes.

##### Credit Risk Concentrations

Financial instruments which subject the Foundation to concentrations of credit risk consist of cash and investments. The Foundation may periodically have cash balances in excess of federal depository insurance limits and investments are substantially uninsured. To date, the Foundation has not experienced any significant losses on these depository accounts.

#### 3. LIQUIDITY AND AVAILABILITY OF FINANCIAL ASSETS:

As of September 30, 2024 and 2023, financial assets available to meet cash needs for general expenditures within one year of the statement of financial position date are as follows:

	2024	2023
Cash	\$ 25,089	\$ 16,575
Investments	1,581,097	1,313,843
Total financial assets	1,606,186	1,330,418
Less those unavailable for general expenditure within one year, due to:		
Board designated funds	(77,454)	(68,054)
Donor restricted endowment funds	(581,530)	(579,175)
Financial assets available for general expenditure within one year	\$ 947,202	\$ 683,189

The Foundation manages its liquidity by operating within what management contends is a prudent range of diversification and risk; maintaining adequate liquid assets to fund current operations; and keeping sufficient savings to provide for long-term plans and projections.

# CAPITAL DISTRICT KIWANIS FOUNDATION

## NOTES TO FINANCIAL STATEMENTS - (Continued)

### 4. INVESTMENTS:

The Foundation's investments consist of the following as of September 30, 2024 and 2023:

	2024		2023	
	Cost	Market	Cost	Market
Money market funds	\$ 37,004	\$ 37,004	\$ 41,324	\$ 41,324
Corporate bonds	386,588	381,112	328,387	302,933
Mutual funds	284,280	398,330	321,853	374,089
Corporate equities	502,674	764,651	488,425	595,497
	<u>\$ 1,210,546</u>	<u>\$ 1,581,097</u>	<u>\$ 1,179,989</u>	<u>\$ 1,313,843</u>

### 5. FAIR VALUE MEASUREMENTS:

As of September 30, 2024 and 2023, the Foundation's fair value measurements within the fair value hierarchy consist of the following:

September 30, 2024:

	Fair Value	Level 1	Level 2
Money market funds	\$ 37,004	\$ 37,004	\$ -
Corporate bonds	381,112	-	381,112
Mutual funds	398,330	398,330	-
Corporate equities	764,651	764,651	-
	<u>\$ 1,581,097</u>	<u>\$ 1,199,985</u>	<u>\$ 381,112</u>

September 30, 2023:

	Fair Value	Level 1	Level 2
Money Market funds	\$ 41,324	\$ 41,324	\$ -
Corporate bonds	302,933	-	302,933
Mutual funds	374,089	374,089	-
Corporate equities	595,497	595,497	-
Marketable securities	<u>\$ 1,313,843</u>	<u>\$ 1,010,910</u>	<u>\$ 302,933</u>

Money market funds, mutual funds, and corporate equities are valued at quoted market prices on the last business day of the fiscal year. Corporate bonds are valued using pricing models based upon observable market inputs of similar securities.

## CAPITAL DISTRICT KIWANIS FOUNDATION

### NOTES TO FINANCIAL STATEMENTS - (Continued)

#### 6. BOARD DESIGNATED NET ASSETS:

The board has established certain funds from net assets without donor restrictions to be used for various purposes. As of September 30, 2024 and 2023, the Foundation has the following board designated funds:

Ellis Stroup Scholarship Fund – This scholarship fund was initially established by a donation from Ellis Stroup and subsequently others to help fund scholarship awards to deserving youth to participate in Kiwanis programs and activities.

Jim Molar Award Fund – The Foundation established the Jim Molar Fund to raise funds for awards to deserving youth to participate in Kiwanis programs and activities.

Disaster Assistance Fund – In light of the recent pandemic and numerous natural disasters, the Foundation established the Disaster Assistance Fund to provide support to local districts and individuals impacted by the COVID-19 pandemic and nationally declared natural disasters.

West Virginia Key Club Fund – This fund was established to support the activities of the Capital District Key Clubs located in West Virginia, including funding to attend District and International Key Club conferences and events, and for scholarships.

Youth Services Fund – This fund was established to support the Capital District Key Leader program or other youth services activities.

Pediatric Trauma Center Hospital Fund – This fund was established to support children in need of medical help and to improve the well-being of children by providing them specialized care.

Youth Outreach Key Club and Circle K Funds – These funds were established to support Capital District Key clubs and Capital District Circle K, respectively.

The above-board designated funds had the following balances as of September 30, 2024 and 2023:

	2024	2023
Ellis Stroup scholarship fund	\$ 7,000	\$ 9,000
Jim Molar award fund	10,963	10,963
Disaster assistance fund	500	500
West Virginia key club fund	33,399	33,999
Youth services fund	13,592	13,592
Pediatric trauma center hospital fund	12,000	-
	<u>\$ 77,454</u>	<u>\$ 68,054</u>

## CAPITAL DISTRICT KIWANIS FOUNDATION

### NOTES TO FINANCIAL STATEMENTS - (Continued)

#### 7. NET ASSETS WITH DONOR RESTRICTIONS:

The Foundation has various donor restricted funds that are perpetually restricted and held within their endowment. As of September 30, 2024 and 2023, these funds include:

Life Membership Fund – This fund was established to maintain the one-time international dues of life members.

Founder Society Fund – This fund helps ensure the future viability of the Foundation.

Tablet of Honor Fund – The purpose of this fund is to allow donors to honor their family and friends via contributions.

Memorial Funds – The purpose of this fund is to honor deceased family and friends via contributions.

The corpus of contributions to each fund above must be maintained in perpetuity; however, the income of the funds is used to support current Foundation programs and activities.

The above donor restricted funds had the following balances as of September 30, 2024 and 2023:

	2024	2023
Life membership fund	\$ 312,300	\$ 311,545
Founder society fund	125,787	125,787
Tablet of honor fund	75,391	74,141
Memorial fund	68,052	67,702
	<u>\$ 581,530</u>	<u>\$ 579,175</u>

#### 8. ENDOWMENT:

The Foundation's endowment consists of individual funds established for a variety of purposes as outlined in the footnote titled "Net Assets with Donor Restrictions". As required by GAAP, net assets associated with endowment funds are classified and reported based on the existence or absence of donor-imposed restrictions.



## CAPITAL DISTRICT KIWANIS FOUNDATION

### NOTES TO FINANCIAL STATEMENTS - (Continued)

#### **8. NET ASSETS WITH DONOR RESTRICTIONS – (Continued):**

##### Return Objectives and Risk Parameters

The Foundation has adopted investment and spending policies for endowment assets that attempt to provide continued financial stability and a predictable stream of funding to programs supporting the Foundation's mission while seeking to maintain the purchasing power of the endowment assets. Endowment assets include those assets of donor-restricted funds that the Foundation must hold in perpetuity or for a donor-specified period. Under these policies, as approved by the Board, the endowment assets are invested in a manner that is intended to produce a competitive rate of return while assuming a moderate level of investment risk and ensure safety through diversification. Actual returns in any given year may vary.

##### Strategies Employed for Achieving Objectives

To satisfy its long-term rate of return objectives, the Foundation relies on a total return strategy in which investment returns are achieved through both capital appreciation (realized and unrealized) and current yields (interest and dividends). The Foundation targets a diversified asset allocation that places a greater emphasis on equity investments within a balanced portfolio to achieve its long-term objectives with prudent risk constraints.

##### Spending Policy and How the Investment Objectives Relate to Spending Policy

The Foundation's current individual funds within the endowment allow the income of the funds to be used to support the Foundation's programs and activities (i.e., income is classified as net assets without donor restrictions). As such no withdrawals are made from the endowment. The endowment only increases by new donor-restricted contributions.

##### Funds with Deficiencies

From time to time, the fair value of assets associated with individual donor restricted endowment funds may fall below the level that the donor or the Uniform Prudent Management of Institutional Funds Act ("UPMIFA") requires the Foundation to retain as a fund of perpetual duration (i.e., underwater endowments). The Foundation has interpreted UPMIFA to permit spending from underwater endowments in accordance with prudent measures required under law. There were no such deficiencies as of both September 30, 2024 and 2023.

## CAPITAL DISTRICT KIWANIS FOUNDATION

### NOTES TO FINANCIAL STATEMENTS - (Continued)

#### 8. ENDOWMENT – (Continued):

##### Changes in Endowment Net Assets

Changes in endowment net assets for the year ending September 30, 2024 and 2023, are as follows:

	<u>2024</u>	<u>2023</u>
Endowment net assets, beginning	\$ 579,175	\$ 576,115
Contributions	<u>2,355</u>	<u>3,060</u>
Endowment net assets, ending	<u>\$ 581,530</u>	<u>\$ 579,175</u>

##### Interpretation of Relevant Law

The Board has interpreted the UPMIFA adopted by the Virginia legislature as requiring the preservation of the fair value of the original gift as of the gift date of the donor-restricted endowment funds absent explicit donor stipulations to the contrary. As a result of this interpretation, the Foundation retains in perpetuity and classifies as net assets with donor restrictions (a) the original value of gifts donated to the perpetual endowment, (b) the original value of subsequent gifts to the perpetual endowment, and (c) accumulations to the perpetual endowment made in accordance with the direction of the applicable donor gift instrument at the time the accumulation is added to the fund.

The remaining portion of the donor-restricted endowment that is not retained in perpetuity is subject to appropriation for expenditure by the Foundation in a manner consistent with the standard of prudence prescribed by UPMIFA. In accordance with UPMIFA, the Foundation considers the following factors in deciding to appropriate or accumulate donor-restricted endowment funds:

- The duration and preservation of the fund
- The purposes of the Foundation and the donor-restricted endowment fund
- General economic conditions
- The possible effect of inflation and deflation
- The expected total return from income and the appreciation of investments
- Other resources of the Foundation
- The investment policies of the Foundation

#### 8. SUBSEQUENT EVENTS EVALUATION:

The Foundation has performed a subsequent events review through January 28, 2025, the date financial statements were available to be issued. Management concluded that there were no subsequent events which were required to be recorded or disclosed in these financial statements.

**2023 Exempt Org. Return**  
prepared for:

**CAPITAL DISTRICT KIWANIS FOUNDATION**  
15189 LONDONS BRIDGE ROAD  
HAYMARKET, VA 20169

Client Copy

**Foti, Flynn, Lowen & Co., P.C.**  
P.O. Box 12765  
Roanoke, VA 24028

**Return of Organization Exempt From Income Tax**  
Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)**2023**Department of the Treasury  
Internal Revenue ServiceDo not enter social security numbers on this form as it may be made public.  
Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.**Open to Public Inspection****A** For the 2023 calendar year, or tax year beginning 10/01, 2023, and ending 9/30, 2024**B** Check if applicable:

- ☐ Address change  
☐ Name change  
☐ Initial return  
☐ Final return/terminated  
☐ Amended return  
☐ Application pending

**C**  
CAPITAL DISTRICT KIWANIS FOUNDATION  
15189 LONDONS BRIDGE ROAD  
HAYMARKET, VA 20169**D** Employer identification number

23-7226256

**E** Telephone number

(703) 402-5959

**G** Gross receipts \$ 387,936.**F** Name and address of principal officer: HIAWATHA NICELY  
SAME AS C ABOVE**H(a)** Is this a group return for subordinates? ☐ Yes ☒ No**H(b)** Are all subordinates included? ☐ Yes ☐ No  
If "No," attach a list. See instructions.**I** Tax-exempt status: ☒ 501(c)(3) ☐ 501(c) ( ) (insert no.) ☐ 4947(a)(1) or ☐ 527**J** Website: K03.SITE.KIWANS.ORG/FOUNDATION**H(c)** Group exemption number**K** Form of organization: ☒ Corporation ☐ Trust ☐ Association ☐ Other**L** Year of formation: 1972 **M** State of legal domicile: VA**Part I Summary**

Activities & Governance	1	Briefly describe the organization's mission or most significant activities: SEE SCHEDULE O		
	2	Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.		
	3	Number of voting members of the governing body (Part VI, line 1a)	3	30
	4	Number of independent voting members of the governing body (Part VI, line 1b)	4	30
	5	Total number of individuals employed in calendar year 2023 (Part V, line 2a)	5	0
	6	Total number of volunteers (estimate if necessary)	6	30
	7a	Total unrelated business revenue from Part VIII, column (C), line 12	7a	0.
b	Net unrelated business taxable income from Form 990-T, Part I, line 11	7b	0.	
Revenue	8	Contributions and grants (Part VIII, line 1h)	Prior Year	Current Year
	9	Program service revenue (Part VIII, line 2g)	49,203.	65,897.
	10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	59,669.	101,170.
	11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	-3,424.	-3,029.
	12	Total revenue — add lines 8 through 11 (must equal Part VIII, column (A), line 12)	105,448.	164,038.
	13	Grants and similar amounts paid (Part IX, column (A), lines 1-3)	85,539.	83,848.
	14	Benefits paid to or for members (Part IX, column (A), line 4)		
Expenses	15	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)		
	16a	Professional fundraising fees (Part IX, column (A), line 11e)		
	b	Total fundraising expenses (Part IX, column (D), line 25)	3,520.	
	17	Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	11,676.	17,600.
	18	Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	97,215.	101,448.
	19	Revenue less expenses. Subtract line 18 from line 12	8,233.	62,590.
	Net Assets or Fund Balances	20	Total assets (Part X, line 16)	Beginning of Current Year
21		Total liabilities (Part X, line 26)	1,330,418.	1,606,186.
22		Net assets or fund balances. Subtract line 21 from line 20	0.	0.
			1,330,418.	1,606,186.

**Part II Signature Block**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Sign Here	Signature of officer		Date	
	DAVID LURIE		TREASURER	
Paid Preparer Use Only	Print/Type preparer's name		Preparer's signature	Date
	ROBERT G. JENNINGS, CPA		ROBERT G. JENNINGS, CPA	1/17/25
	Firm's name		Firm's EIN	Check <input type="checkbox"/> if self-employed PTIN
	FOTI, FLYNN, LOWEN & CO., P.C.		20-8087076	P02156839
Firm's address		Phone no.		
P.O. BOX 12765		(540) 344-9246		
ROANOKE, VA 24028				

May the IRS discuss this return with the preparer shown above? See instructions ☒ Yes ☐ No

**Part III Statement of Program Service Accomplishments**Check if Schedule O contains a response or note to any line in this Part III ☒**1** Briefly describe the organization's mission:

SEE SCHEDULE O

**2** Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? ☐ Yes ☒ No

If "Yes," describe these new services on Schedule O.

**3** Did the organization cease conducting, or make significant changes in how it conducts, any program services? ☐ Yes ☒ No

If "Yes," describe these changes on Schedule O.

**4** Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.**4a** (Code: ) (Expenses \$ 44,000. including grants of \$ 44,000.) (Revenue \$ )  
GRANTS TO PEDIATRIC TRAUMA HOSPITALS SUPPOORTING CHILDREN LIVING IN THE CAPITAL DISTRICT.**4b** (Code: ) (Expenses \$ 21,550. including grants of \$ 21,550.) (Revenue \$ )  
GRANT TO KIWANS CLUBS IN THE CAPITAL DISTRICT TO SUPPLEMENT THEIR RESOURCES FOR SERVICE IN SUPPORT OF CHILDREN FROM MEALS TO AFTER SCHOOL ACTIVITIES TO RECREATIONAL OPPORTUNITIES.**4c** (Code: ) (Expenses \$ 18,298. including grants of \$ 18,298.) (Revenue \$ )  
SCHOLARSHIPS TO HIGHSCHOOL STUDENTS IN DISTRICT-BASED KEY CLUBS AND COLLEDGE STUDENTS IN DISTRICT-BASED CIRCLE K CHAPTERS, AND TEENAGER OF THE YEAR SCHOLARSHIP TO ONE YOUTH IN THE DISTRICT. ALL OF WHOM DEMONSTRATE OUTSTANDING LEADERSHIP, COMMUNITY SERVICE AND SCHOLARSHIP.**4d** Other program services (Describe on Schedule O.) SEE SCHEDULE O

(Expenses \$ 7,040. including grants of \$ ) (Revenue \$ )

**4e** Total program service expenses 90,888.

**Part IV Checklist of Required Schedules**

	Yes	No
1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If "Yes," complete Schedule A	X	
2 Is the organization required to complete Schedule B, Schedule of Contributors? See instructions	X	
3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I		X
4 <b>Section 501(c)(3) organizations.</b> Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? If "Yes," complete Schedule C, Part II		X
5 Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? If "Yes," complete Schedule C, Part III		X
6 Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If "Yes," complete Schedule D, Part I		X
7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? If "Yes," complete Schedule D, Part II		X
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete Schedule D, Part III		X
9 Did the organization report an amount in Part X, line 21, for escrow or custodial account liability, serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? If "Yes," complete Schedule D, Part IV		X
10 Did the organization, directly or through a related organization, hold assets in donor-restricted endowments or in quasi-endowments? If "Yes," complete Schedule D, Part V	X	
11 If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X, as applicable.		
a Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes," complete Schedule D, Part VI		X
b Did the organization report an amount for investments – other securities in Part X, line 12, that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII		X
c Did the organization report an amount for investments – program related in Part X, line 13, that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VIII		X
d Did the organization report an amount for other assets in Part X, line 15, that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part IX		X
e Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X		X
f Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? If "Yes," complete Schedule D, Part X	X	
12a Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete Schedule D, Parts XI and XII	X	
b Was the organization included in consolidated, independent audited financial statements for the tax year? If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional		X
13 Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E		X
14a Did the organization maintain an office, employees, or agents outside of the United States?		X
b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? If "Yes," complete Schedule F, Parts I and IV		X
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? If "Yes," complete Schedule F, Parts II and IV		X
16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? If "Yes," complete Schedule F, Parts III and IV		X
17 Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? If "Yes," complete Schedule G, Part I. See instructions		X
18 Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? If "Yes," complete Schedule G, Part II	X	
19 Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If "Yes," complete Schedule G, Part III		X
20a Did the organization operate one or more hospital facilities? If "Yes," complete Schedule H		X
b If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?		
21 Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? If "Yes," complete Schedule I, Parts I and II		X

**Part IV Checklist of Required Schedules** (continued)

	Yes	No
<b>22</b> Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? <i>If "Yes," complete Schedule I, Parts I and III.</i> .....	<b>22</b>	X
<b>23</b> Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5, about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If "Yes," complete Schedule J.</i> .....	<b>23</b>	X
<b>24a</b> Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a.</i> .....	<b>24a</b>	X
<b>b</b> Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? .....	<b>24b</b>	
<b>c</b> Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? .....	<b>24c</b>	
<b>d</b> Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? .....	<b>24d</b>	
<b>25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations.</b> Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I.</i> .....	<b>25a</b>	X
<b>b</b> Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If "Yes," complete Schedule L, Part I.</i> .....	<b>25b</b>	X
<b>26</b> Did the organization report any amount on Part X, line 5 or 22, for receivables from or payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons? <i>If "Yes," complete Schedule L, Part II.</i> .....	<b>26</b>	X
<b>27</b> Did the organization provide a grant or other assistance to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity (including an employee thereof) or family member of any of these persons? <i>If "Yes," complete Schedule L, Part III.</i> .....	<b>27</b>	X
<b>28</b> Was the organization a party to a business transaction with one of the following parties? (See the Schedule L, Part IV, instructions for applicable filing thresholds, conditions, and exceptions).		
<b>a</b> A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? <i>If "Yes," complete Schedule L, Part IV.</i> .....	<b>28a</b>	X
<b>b</b> A family member of any individual described in line 28a? <i>If "Yes," complete Schedule L, Part IV.</i> .....	<b>28b</b>	X
<b>c</b> A 35% controlled entity of one or more individuals and/or organizations described in line 28a or 28b? <i>If "Yes," complete Schedule L, Part IV.</i> .....	<b>28c</b>	X
<b>29</b> Did the organization receive more than \$25,000 in noncash contributions? <i>If "Yes," complete Schedule M.</i> .....	<b>29</b>	X
<b>30</b> Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M.</i> .....	<b>30</b>	X
<b>31</b> Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I.</i> .....	<b>31</b>	X
<b>32</b> Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II.</i> .....	<b>32</b>	X
<b>33</b> Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I.</i> .....	<b>33</b>	X
<b>34</b> Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1.</i> .....	<b>34</b>	X
<b>35a</b> Did the organization have a controlled entity within the meaning of section 512(b)(13)? .....	<b>35a</b>	X
<b>b</b> If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," complete Schedule R, Part V, line 2.</i> .....	<b>35b</b>	
<b>36 Section 501(c)(3) organizations.</b> Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2.</i> .....	<b>36</b>	X
<b>37</b> Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If "Yes," complete Schedule R, Part VI.</i> .....	<b>37</b>	X
<b>38</b> Did the organization complete Schedule O and provide explanations on Schedule O for Part VI, lines 11b and 19? <b>Note:</b> All Form 990 filers are required to complete Schedule O. ....	<b>38</b>	X

**Part V Statements Regarding Other IRS Filings and Tax Compliance**Check if Schedule O contains a response or note to any line in this Part V. ☐

	Yes	No
<b>1a</b> Enter the number reported in box 3 of Form 1096. Enter -0- if not applicable. ....	<b>1a</b>	0
<b>b</b> Enter the number of Forms W-2G included on line 1a. Enter -0- if not applicable. ....	<b>1b</b>	0
<b>c</b> Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners? .....	<b>1c</b>	

**Part V** Statements Regarding Other IRS Filings and Tax Compliance (continued)

	Yes	No
<b>2a</b> Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return. .... <b>2a</b> 0		
<b>b</b> If at least one is reported on line 2a, did the organization file all required federal employment tax returns? .... <b>2b</b>		
<b>3a</b> Did the organization have unrelated business gross income of \$1,000 or more during the year? .... <b>3a</b>		X
<b>b</b> If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation on Schedule O. .... <b>3b</b>		
<b>4a</b> At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)? .... <b>4a</b>		X
<b>b</b> If "Yes," enter the name of the foreign country See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).		
<b>5a</b> Was the organization a party to a prohibited tax shelter transaction at any time during the tax year? .... <b>5a</b>		X
<b>b</b> Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction? .... <b>5b</b>		X
<b>c</b> If "Yes," to line 5a or 5b, did the organization file Form 8886-T? .... <b>5c</b>		
<b>6a</b> Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions? .... <b>6a</b>		X
<b>b</b> If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible? .... <b>6b</b>		
<b>7 Organizations that may receive deductible contributions under section 170(c).</b>		
<b>a</b> Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor? .... <b>7a</b>		X
<b>b</b> If "Yes," did the organization notify the donor of the value of the goods or services provided? .... <b>7b</b>		
<b>c</b> Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282? .... <b>7c</b>		X
<b>d</b> If "Yes," indicate the number of Forms 8282 filed during the year. .... <b>7d</b>		
<b>e</b> Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? .... <b>7e</b>		X
<b>f</b> Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? .... <b>7f</b>		X
<b>g</b> If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required? .... <b>7g</b>		
<b>h</b> If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C? .... <b>7h</b>		
<b>8 Sponsoring organizations maintaining donor advised funds.</b> Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year? .... <b>8</b>		
<b>9 Sponsoring organizations maintaining donor advised funds.</b>		
<b>a</b> Did the sponsoring organization make any taxable distributions under section 4966? .... <b>9a</b>		
<b>b</b> Did the sponsoring organization make a distribution to a donor, donor advisor, or related person? .... <b>9b</b>		
<b>10 Section 501(c)(7) organizations.</b> Enter:		
<b>a</b> Initiation fees and capital contributions included on Part VIII, line 12. .... <b>10a</b>		
<b>b</b> Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities. .... <b>10b</b>		
<b>11 Section 501(c)(12) organizations.</b> Enter:		
<b>a</b> Gross income from members or shareholders. .... <b>11a</b>		
<b>b</b> Gross income from other sources. (Do not net amounts due or paid to other sources against amounts due or received from them.) .... <b>11b</b>		
<b>12a Section 4947(a)(1) non-exempt charitable trusts.</b> Is the organization filing Form 990 in lieu of Form 1041? .... <b>12a</b>		
<b>b</b> If "Yes," enter the amount of tax-exempt interest received or accrued during the year. .... <b>12b</b>		
<b>13 Section 501(c)(29) qualified nonprofit health insurance issuers.</b>		
<b>a</b> Is the organization licensed to issue qualified health plans in more than one state? .... <b>13a</b>		
<b>Note:</b> See the instructions for additional information the organization must report on Schedule O.		
<b>b</b> Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans. .... <b>13b</b>		
<b>c</b> Enter the amount of reserves on hand. .... <b>13c</b>		
<b>14a</b> Did the organization receive any payments for indoor tanning services during the tax year? .... <b>14a</b>		X
<b>b</b> If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation on Schedule O. .... <b>14b</b>		
<b>15</b> Is the organization subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year? .... <b>15</b>		X
If "Yes," see the instructions and file Form 4720, Schedule N.		
<b>16</b> Is the organization an educational institution subject to the section 4968 excise tax on net investment income? .... <b>16</b>		X
If "Yes," complete Form 4720, Schedule O.		
<b>17 Section 501(c)(21) organizations.</b> Did the trust, or any disqualified or other person, engage in any activities that would result in the imposition of an excise tax under section 4951, 4952, or 4953? .... <b>17</b>		
If "Yes," complete Form 6069.		



**Part VI Governance, Management, and Disclosure.** For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes on Schedule O. See instructions.Check if Schedule O contains a response or note to any line in this Part VI. ☒**Section A. Governing Body and Management**

		Yes	No
<b>1a</b> Enter the number of voting members of the governing body at the end of the tax year. ....	<b>1a</b> 30		
If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain on Schedule O.			
<b>b</b> Enter the number of voting members included on line 1a, above, who are independent. ....	<b>1b</b> 30		
<b>2</b> Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee? .....	<b>2</b>		X
<b>3</b> Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, trustees, or key employees to a management company or other person? .....	<b>3</b>		X
<b>4</b> Did the organization make any significant changes to its governing documents since the prior Form 990 was filed? .....	<b>4</b>		X
<b>5</b> Did the organization become aware during the year of a significant diversion of the organization's assets? .....	<b>5</b>		X
<b>6</b> Did the organization have members or stockholders? .....	<b>6</b>		X
<b>7a</b> Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body? .....	<b>7a</b>		X
<b>b</b> Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body? .....	<b>7b</b>		X
<b>8</b> Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:			
<b>a</b> The governing body? .....	<b>8a</b>	X	
<b>b</b> Each committee with authority to act on behalf of the governing body? .....	<b>8b</b>	X	
<b>9</b> Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses on Schedule O. ....	<b>9</b>		X

**Section B. Policies** (This Section B requests information about policies not required by the Internal Revenue Code.)

	Yes	No
<b>10a</b> Did the organization have local chapters, branches, or affiliates? .....	<b>10a</b>	X
<b>b</b> If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes? .....	<b>10b</b>	
<b>11a</b> Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? .....	<b>11a</b> X	
<b>b</b> Describe on Schedule O the process, if any, used by the organization to review this Form 990. SEE SCHEDULE O		
<b>12a</b> Did the organization have a written conflict of interest policy? If "No," go to line 13 .....	<b>12a</b> X	
<b>b</b> Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts? .....	<b>12b</b> X	
<b>c</b> Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe on Schedule O how this was done. SEE SCHEDULE O	<b>12c</b> X	
<b>13</b> Did the organization have a written whistleblower policy? .....	<b>13</b> X	
<b>14</b> Did the organization have a written document retention and destruction policy? .....	<b>14</b> X	
<b>15</b> Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?		
<b>a</b> The organization's CEO, Executive Director, or top management official. ....	<b>15a</b>	X
<b>b</b> Other officers or key employees of the organization. ....	<b>15b</b>	X
If "Yes" to line 15a or 15b, describe the process on Schedule O. See instructions.		
<b>16a</b> Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year? .....	<b>16a</b>	X
<b>b</b> If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements? .....	<b>16b</b>	

**Section C. Disclosure**

**17** List the states with which a copy of this Form 990 is required to be filed VA

**18** Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A, if applicable), 990, and 990-T (section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.

☒ Own website ☒ Another's website ☒ Upon request ☐ Other (explain on Schedule O)

**19** Describe on Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year. SEE SCHEDULE O

**20** State the name, address, and telephone number of the person who possesses the organization's books and records.

DAVID LURIE 15189 LONDONS BRIDGE ROAD HAYMARKET VA 20169 (703) 402-5959

**Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**Check if Schedule O contains a response or note to any line in this Part VII. ☐**Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees****1a** Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List all of the organization's **current** key employees, if any. See the instructions for definition of "key employee."
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (box 5 of Form W-2, box 6 of Form 1099-MISC, and/or box 1 of Form 1099-NEC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

See the instructions for the order in which to list the persons above.

☒ Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

(A) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)					(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Officer	Key employee	Highest compensated employee	Former			
(1) HIAWATHA NICELY PRESIDENT	2 0	X	X				0.	0.	0.
(2) DAVE LARABA PRESIDENT-ELECT	2 0	X	X				0.	0.	0.
(3) JOHN TYNER VICE PRESIDENT	2 0	X	X				0.	0.	0.
(4) NANCY SIMONELLI EXEC SECRETARY	5 0	X	X				0.	0.	0.
(5) DAVE LURIE TREASURER	5 0	X	X				0.	0.	0.
(6) EDWIN DALEY PAST PRESIDENT	0.5 0	X					0.	0.	0.
(7) ERIC LAMB GOVERNOR	0.5 0	X					0.	0.	0.
(8) JEFF WOLFF EXECUTIVE DIR.	0.5 0	X					0.	0.	0.
(9) BRIAN BELL REGIONAL DIR.	1.5 0	X					0.	0.	0.
(10) SCOTT PHILLIPS REGIONAL DIR	1.5 0	X					0.	0.	0.
(11) SUE VONA REGIONAL DIR	1.5 0	X					0.	0.	0.
(12) JOE STANKUS REGIONAL DIR	1.5 0	X					0.	0.	0.
(13) JOANN BROOKS REGIONAL DIR	1.5 0	X					0.	0.	0.
(14) DON WITT REGIONAL DIR	1.5 0	X					0.	0.	0.

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Form 990 (2023)

**Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees** (continued)

(A) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(15) LARISSA CASON REGIONAL DIR	1.5 0	X						0.	0.	0.
(16) KIM THOMPSON COORDINATOR	0.5 0	X						0.	0.	0.
(17) JAMIE ARCA COORDINATOR	0.5 0	X						0.	0.	0.
(18) WILLIAM MCQUISTON COORDINATOR	0.5 0	X						0.	0.	0.
(19) CINDY REYNOLDS COORDINATOR	0.5 0	X						0.	0.	0.
(20) BOB CASSADA COORDINATOR	0.5 0	X						0.	0.	0.
(21) DAVE ROTHBERG COORDINATOR	0.5 0	X						0.	0.	0.
(22) CYNTHIA BENAVIDEZ COORDINATOR	0.5 0	X						0.	0.	0.
(23) MILT MARTIN COORDINATOR	0.5 0	X						0.	0.	0.
(24) BRANDON GREGORY COORDINATOR	0.5 0	X						0.	0.	0.
(25) SUSY FRY COORDINATOR	0.5 0	X						0.	0.	0.
<b>1b Subtotal</b>								0.	0.	0.
<b>c Total from continuation sheets to Part VII, Section A</b>								0.	0.	0.
<b>d Total (add lines 1b and 1c)</b>								0.	0.	0.
<b>2</b> Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization	0									

	Yes	No
<b>3</b> Did the organization list any <b>former</b> officer, director, trustee, key employee, or highest compensated employee on line 1a? <i>If "Yes," complete Schedule J for such individual.</i>		X
<b>4</b> For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? <i>If "Yes," complete Schedule J for such individual.</i>		X
<b>5</b> Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? <i>If "Yes," complete Schedule J for such person.</i>		X

**Section B. Independent Contractors**

(A) Name and business address	(B) Description of services	(C) Compensation
<b>2</b> Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization	0	

**2023**Department of the Treasury  
Internal Revenue Service

Name of the Organization

Employer identification number

CAPITAL DISTRICT KIWANIS FOUNDATION

23-7226256

**Part VII** Continuation: Officers, Directors, Trustees, Key Employees, and  
Highest Compensated Employees

(A) Name and title	(B) Average hours per week (list any hours for related organiza- tions below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099- MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099- MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) JON RIFE COORDINATOR	0.5 0	X						0.	0.	0.
(2) NATASHA BASIL COORDINATOR	0.5 0	X						0.	0.	0.
(3) PAUL SPRADLING COORDINATOR	0.5 0	X						0.	0.	0.
(4) JEANETTE OGILIVIE COORDINATOR	1 0	X						0.	0.	0.
(5) CHARLES MARKS COORDINATOR	0.6 0	X						0.	0.	0.
(6)										
(7)										
(8)										
(9)										
(10)										
(11)										
(12)										
(13)										
(14)										
(15)										
(16)										
(17)										
(18)										
(19)										
(20)										
(21)										

**Part VIII Statement of Revenue**Check if Schedule O contains a response or note to any line in this Part VIII ☐

				(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512-514	
<b>Contributions, Gifts, Grants, and Other Similar Amounts</b>	1a	Federated campaigns .....	1a					
	b	Membership dues .....	1b					
	c	Fundraising events .....	1c	30,651.				
	d	Related organizations .....	1d					
	e	Government grants (contributions) .....	1e					
	f	All other contributions, gifts, grants, and similar amounts not included above .....	1f	35,246.				
	g	Noncash contributions included in lines 1a-1f. ....	1g					
	h Total. Add lines 1a-1f .....			65,897.				
	<b>Program Service Revenue</b>	Business Code						
2a								
b								
c								
d								
e								
f		All other program service revenue .....						
g Total. Add lines 2a-2f .....								
<b>Other Revenue</b>	3 Investment income (including dividends, interest, and other similar amounts) .....			38,227.			38,227.	
	4 Income from investment of tax-exempt bond proceeds .....							
	5 Royalties .....							
	6a	Gross rents .....	(i) Real	(ii) Personal				
			6a					
			6b					
	b	Less: rental expenses .....	6b					
	c	Rental income or (loss) .....	6c					
	d Net rental income or (loss) .....							
	7a	Gross amount from sales of assets other than inventory .....	(i) Securities	(ii) Other				
			7a	283,812.				
			7b	220,869.				
	b	Less: cost or other basis and sales expenses .....	7b					
	c	Gain or (loss) .....	7c	62,943.				
	d Net gain or (loss) .....			62,943.			62,943.	
	8a	Gross income from fundraising events (not including \$ 30,651. of contributions reported on line 1c). See Part IV, line 18 .....						
			8a					
8b			3,029.					
b	Less: direct expenses .....	8b						
c Net income or (loss) from fundraising events .....			-3,029.			-3,029.		
9a	Gross income from gaming activities. See Part IV, line 19 .....							
		9a						
		9b						
b	Less: direct expenses .....	9b						
c Net income or (loss) from gaming activities .....								
10a	Gross sales of inventory, less returns and allowances .....							
		10a						
		10b						
b	Less: cost of goods sold. ....	10b						
c Net income or (loss) from sales of inventory .....								
<b>Miscellaneous Revenue</b>	Business Code							
	11a							
	b							
	c							
	d	All other revenue .....						
	e Total. Add lines 11a-11d .....							
12 Total revenue. See instructions .....			164,038.	0.	0.	98,141.		

**Part IX Statement of Functional Expenses**

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX. ☐

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21.	83,848.	83,848.		
2 Grants and other assistance to domestic individuals. See Part IV, line 22.				
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16.				
4 Benefits paid to or for members.				
5 Compensation of current officers, directors, trustees, and key employees.	0.	0.	0.	0.
6 Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B).	0.	0.	0.	0.
7 Other salaries and wages.				
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions).				
9 Other employee benefits.				
10 Payroll taxes.				
11 Fees for services (nonemployees):				
a Management.				
b Legal.				
c Accounting.	16,089.	6,435.	6,436.	3,218.
d Lobbying.				
e Professional fundraising services. See Part IV, line 17.				
f Investment management fees.				
g Other. (If line 11g amount exceeds 10% of line 25, column (A), amount, list line 11g expenses on Schedule O.)	794.	318.	317.	159.
12 Advertising and promotion.				
13 Office expenses.				
14 Information technology.				
15 Royalties.				
16 Occupancy.				
17 Travel.				
18 Payments of travel or entertainment expenses for any federal, state, or local public officials.				
19 Conferences, conventions, and meetings.				
20 Interest.				
21 Payments to affiliates.				
22 Depreciation, depletion, and amortization.				
23 Insurance.				
24 Other expenses. Itemize expenses not covered above. (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A), amount, list line 24e expenses on Schedule O.)				
a SUPPLIES	209.	84.	83.	42.
b BANK SERVICE CHARGES	207.	83.	83.	41.
c POSTAGE AND SHIPPING	161.	64.	65.	32.
d TAXES AND LICENSES	75.	30.	30.	15.
e All other expenses.	65.	26.	26.	13.
25 Total functional expenses. Add lines 1 through 24e.	101,448.	90,888.	7,040.	3,520.
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720).				

**Part X Balance Sheet**Check if Schedule O contains a response or note to any line in this Part X. ☐

		(A) Beginning of year		(B) End of year
<b>Assets</b>	1 Cash — non-interest-bearing .....	16,575.	1	25,089.
	2 Savings and temporary cash investments .....		2	
	3 Pledges and grants receivable, net .....		3	
	4 Accounts receivable, net .....		4	
	5 Loans and other receivables from any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons .....		5	
	6 Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B) .....		6	
	7 Notes and loans receivable, net .....		7	
	8 Inventories for sale or use .....		8	
	9 Prepaid expenses and deferred charges .....		9	
	10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D .....	10a		
	b Less: accumulated depreciation .....	10b		10c
	11 Investments — publicly traded securities .....	1,313,843.	11	1,581,097.
	12 Investments — other securities. See Part IV, line 11 .....		12	
	13 Investments — program-related. See Part IV, line 11 .....		13	
	14 Intangible assets .....		14	
	15 Other assets. See Part IV, line 11 .....		15	
16 <b>Total assets.</b> Add lines 1 through 15 (must equal line 33) .....	1,330,418.	16	1,606,186.	
<b>Liabilities</b>	17 Accounts payable and accrued expenses .....		17	
	18 Grants payable .....		18	
	19 Deferred revenue .....		19	
	20 Tax-exempt bond liabilities .....		20	
	21 Escrow or custodial account liability. Complete Part IV of Schedule D .....		21	
	22 Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons .....		22	
	23 Secured mortgages and notes payable to unrelated third parties .....		23	
	24 Unsecured notes and loans payable to unrelated third parties .....		24	
	25 Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D .....		25	
	26 <b>Total liabilities.</b> Add lines 17 through 25 .....	0.	26	0.
<b>Net Assets or Fund Balances</b>	<b>Organizations that follow FASB ASC 958, check here and complete lines 27, 28, 32, and 33.</b> <input checked="" type="checkbox"/>			
	27 Net assets without donor restrictions .....	751,243.	27	1,024,656.
	28 Net assets with donor restrictions .....	579,175.	28	581,530.
	<b>Organizations that do not follow FASB ASC 958, check here and complete lines 29 through 33.</b> <input type="checkbox"/>			
	29 Capital stock or trust principal, or current funds .....		29	
	30 Paid-in or capital surplus, or land, building, or equipment fund .....		30	
	31 Retained earnings, endowment, accumulated income, or other funds .....		31	
	32 <b>Total net assets or fund balances.</b> .....	1,330,418.	32	1,606,186.
	33 <b>Total liabilities and net assets/fund balances.</b> .....	1,330,418.	33	1,606,186.

**Part XI Reconciliation of Net Assets**Check if Schedule O contains a response or note to any line in this Part XI. ☐

<b>1</b>	Total revenue (must equal Part VIII, column (A), line 12)	<b>1</b>	164,038.
<b>2</b>	Total expenses (must equal Part IX, column (A), line 25)	<b>2</b>	101,448.
<b>3</b>	Revenue less expenses. Subtract line 2 from line 1	<b>3</b>	62,590.
<b>4</b>	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	<b>4</b>	1,330,418.
<b>5</b>	Net unrealized gains (losses) on investments	<b>5</b>	213,178.
<b>6</b>	Donated services and use of facilities	<b>6</b>	
<b>7</b>	Investment expenses	<b>7</b>	
<b>8</b>	Prior period adjustments	<b>8</b>	
<b>9</b>	Other changes in net assets or fund balances (explain on Schedule O)	<b>9</b>	0.
<b>10</b>	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B))	<b>10</b>	1,606,186.

**Part XII Financial Statements and Reporting**Check if Schedule O contains a response or note to any line in this Part XII. ☐

		Yes	No
<b>1</b>	Accounting method used to prepare the Form 990: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other _____		
If the organization changed its method of accounting from a prior year or checked "Other," explain on Schedule O.			
<b>2a</b>	Were the organization's financial statements compiled or reviewed by an independent accountant?		X
If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both.			
<input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis			
<b>b</b>	Were the organization's financial statements audited by an independent accountant?	X	
If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both.			
<input checked="" type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis			
<b>c</b>	If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant?	X	
If the organization changed either its oversight process or selection process during the tax year, explain on Schedule O.			
<b>3a</b>	As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Uniform Guidance, 2 C.F.R. Part 200, Subpart F?		X
<b>b</b>	If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why on Schedule O and describe any steps taken to undergo such audits		

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Form 990 (2023)



**SCHEDULE A**  
**(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Public Charity Status and Public Support**

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

Attach to Form 990 or Form 990-EZ.

Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No. 1545-0047

**2023**

**Open to Public  
Inspection**

Name of the organization

CAPITAL DISTRICT KIWANIS FOUNDATION

Employer identification number

23-7226256

**Part I Reason for Public Charity Status.** (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.)

- 1 ☐ A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i).**
- 2 ☐ A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E (Form 990).)
- 3 ☐ A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**
- 4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state: \_\_\_\_\_
- 5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II.)
- 6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**
- 7 ☒ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 8 ☐ A community trust described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 9 ☐ An agricultural research organization described in **section 170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university: \_\_\_\_\_
- 10 ☐ An organization that normally receives (1) more than 33-1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions, subject to certain exceptions, and (2) no more than 33-1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2).** (Complete Part III.)
- 11 ☐ An organization organized and operated exclusively to test for public safety. See **section 509(a)(4).**
- 12 ☐ An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2).** See **section 509(a)(3).** Check the box on lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.
- a ☐ **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**
- b ☐ **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**
- c ☐ **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**
- d ☐ **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**
- e ☐ Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.
- f Enter the number of supported organizations: \_\_\_\_\_
- g Provide the following information about the supported organization(s).

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-10 above (see instructions))	(iv) Is the organization listed in your governing document?		(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
			Yes	No		
(A)						
(B)						
(C)						
(D)						
(E)						
Total						

**Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)**

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

**Section A. Public Support**

Calendar year (or fiscal year beginning in)	(a) 2019	(b) 2020	(c) 2021	(d) 2022	(e) 2023	(f) Total
<b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")	15,899.	235,126.	86,457.	49,203.	65,897.	452,582.
<b>2</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf.						0.
<b>3</b> The value of services or facilities furnished by a governmental unit to the organization without charge.						0.
<b>4 Total.</b> Add lines 1 through 3.	15,899.	235,126.	86,457.	49,203.	65,897.	452,582.
<b>5</b> The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f).						0.
<b>6 Public support.</b> Subtract line 5 from line 4.						452,582.

**Section B. Total Support**

Calendar year (or fiscal year beginning in)	(a) 2019	(b) 2020	(c) 2021	(d) 2022	(e) 2023	(f) Total
<b>7</b> Amounts from line 4.	15,899.	235,126.	86,457.	49,203.	65,897.	452,582.
<b>8</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources.	13,872.	57,314.	21,849.	59,669.	38,227.	190,931.
<b>9</b> Net income from unrelated business activities, whether or not the business is regularly carried on.						0.
<b>10</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						0.
<b>11 Total support.</b> Add lines 7 through 10.						643,513.
<b>12</b> Gross receipts from related activities, etc. (see instructions).					12	0.
<b>13 First 5 years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and <b>stop here</b> .						<input type="checkbox"/>

**Section C. Computation of Public Support Percentage**

<b>14</b> Public support percentage for 2023 (line 6, column (f), divided by line 11, column (f)).	<b>14</b>	70.33 %
<b>15</b> Public support percentage from 2022 Schedule A, Part II, line 14.	<b>15</b>	70.92 %
<b>16a 33-1/3% support test—2023.</b> If the organization did not check the box on line 13, and line 14 is 33-1/3% or more, check this box and <b>stop here</b> . The organization qualifies as a publicly supported organization.	<input checked="" type="checkbox"/>	
<b>b 33-1/3% support test—2022.</b> If the organization did not check a box on line 13 or 16a, and line 15 is 33-1/3% or more, check this box and <b>stop here</b> . The organization qualifies as a publicly supported organization.	<input type="checkbox"/>	
<b>17a 10%-facts-and-circumstances test—2023.</b> If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and <b>stop here</b> . Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization.	<input type="checkbox"/>	
<b>b 10%-facts-and-circumstances test—2022.</b> If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and <b>stop here</b> . Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization.	<input type="checkbox"/>	
<b>18 Private foundation.</b> If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions.	<input type="checkbox"/>	

**Part III Support Schedule for Organizations Described in Section 509(a)(2)**

(Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

**Section A. Public Support**

Calendar year (or fiscal year beginning in)	(a) 2019	(b) 2020	(c) 2021	(d) 2022	(e) 2023	(f) Total
<b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
<b>2</b> Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose.						
<b>3</b> Gross receipts from activities that are not an unrelated trade or business under section 513.						
<b>4</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf.						
<b>5</b> The value of services or facilities furnished by a governmental unit to the organization without charge.						
<b>6 Total.</b> Add lines 1 through 5.						
<b>7a</b> Amounts included on lines 1, 2, and 3 received from disqualified persons.						
<b>b</b> Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year.						
<b>c</b> Add lines 7a and 7b.						
<b>8 Public support.</b> (Subtract line 7c from line 6.)						

**Section B. Total Support**

Calendar year (or fiscal year beginning in)	(a) 2019	(b) 2020	(c) 2021	(d) 2022	(e) 2023	(f) Total
<b>9</b> Amounts from line 6.						
<b>10a</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources.						
<b>b</b> Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975.						
<b>c</b> Add lines 10a and 10b.						
<b>11</b> Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on.						
<b>12</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
<b>13 Total support.</b> (Add lines 9, 10c, 11, and 12.)						

**14 First 5 years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here** ☐**Section C. Computation of Public Support Percentage**

<b>15</b> Public support percentage for 2023 (line 8, column (f), divided by line 13, column (f)).	<b>15</b>	%
<b>16</b> Public support percentage from 2022 Schedule A, Part III, line 15.	<b>16</b>	%

**Section D. Computation of Investment Income Percentage**

<b>17</b> Investment income percentage for <b>2023</b> (line 10c, column (f), divided by line 13, column (f)).	<b>17</b>	%
<b>18</b> Investment income percentage from <b>2022</b> Schedule A, Part III, line 17.	<b>18</b>	%

**19a 33-1/3% support tests—2023.** If the organization did not check the box on line 14, and line 15 is more than 33-1/3%, and line 17 is not more than 33-1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization. ☐**b 33-1/3% support tests—2022.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33-1/3%, and line 18 is not more than 33-1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization. ☐**20 Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions. ☐

**Part IV Supporting Organizations**

(Complete only if you checked a box on line 12 of Part I. If you checked box 12a, Part I, complete Sections A and B. If you checked box 12b, Part I, complete Sections A and C. If you checked box 12c, Part I, complete Sections A, D, and E. If you checked box 12d, Part I, complete Sections A and D, and complete Part V.)

**Section A. All Supporting Organizations**

	Yes	No
<b>1</b> Are all of the organization's supported organizations listed by name in the organization's governing documents? If "No," describe in <b>Part VI</b> how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.		
<b>2</b> Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? If "Yes," explain in <b>Part VI</b> how the organization determined that the supported organization was described in section 509(a)(1) or (2).		
<b>3a</b> Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? If "Yes," answer lines 3b and 3c below.		
<b>b</b> Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? If "Yes," describe in <b>Part VI</b> when and how the organization made the determination.		
<b>c</b> Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? If "Yes," explain in <b>Part VI</b> what controls the organization put in place to ensure such use.		
<b>4a</b> Was any supported organization not organized in the United States ("foreign supported organization")? If "Yes" and if you checked box 12a or 12b in Part I, answer lines 4b and 4c below.		
<b>b</b> Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? If "Yes," describe in <b>Part VI</b> how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.		
<b>c</b> Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? If "Yes," explain in <b>Part VI</b> what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.		
<b>5a</b> Did the organization add, substitute, or remove any supported organizations during the tax year? If "Yes," answer lines 5b and 5c below (if applicable). Also, provide detail in <b>Part VI</b> , including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).		
<b>b Type I or Type II only.</b> Was any added or substituted supported organization part of a class already designated in the organization's organizing document?		
<b>c Substitutions only.</b> Was the substitution the result of an event beyond the organization's control?		
<b>6</b> Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? If "Yes," provide detail in <b>Part VI</b> .		
<b>7</b> Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (as defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? If "Yes," complete Part I of Schedule L (Form 990).		
<b>8</b> Did the organization make a loan to a disqualified person (as defined in section 4958) not described on line 7? If "Yes," complete Part I of Schedule L (Form 990).		
<b>9a</b> Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons, as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? If "Yes," provide detail in <b>Part VI</b> .		
<b>b</b> Did one or more disqualified persons (as defined on line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? If "Yes," provide detail in <b>Part VI</b> .		
<b>c</b> Did a disqualified person (as defined on line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? If "Yes," provide detail in <b>Part VI</b> .		
<b>10a</b> Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? If "Yes," answer line 10b below.		
<b>b</b> Did the organization have any excess business holdings in the tax year? (Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)		

**Part IV Supporting Organizations** (continued)

	Yes	No
<b>11</b> Has the organization accepted a gift or contribution from any of the following persons?		
<b>a</b> A person who directly or indirectly controls, either alone or together with persons described on lines 11b and 11c below, the governing body of a supported organization?		
<b>b</b> A family member of a person described on line 11a above?		
<b>c</b> A 35% controlled entity of a person described on line 11a or 11b above? If "Yes" to line 11a, 11b, or 11c, provide detail in <b>Part VI</b> .		

**Section B. Type I Supporting Organizations**

	Yes	No
<b>1</b> Did the governing body, members of the governing body, officers acting in their official capacity, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's officers, directors, or trustees at all times during the tax year? If "No," describe in <b>Part VI</b> how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove officers, directors, or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.		
<b>2</b> Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? If "Yes," explain in <b>Part VI</b> how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised, or controlled the supporting organization.		

**Section C. Type II Supporting Organizations**

	Yes	No
<b>1</b> Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? If "No," describe in <b>Part VI</b> how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s).		

**Section D. All Type III Supporting Organizations**

	Yes	No
<b>1</b> Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?		
<b>2</b> Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s), or (ii) serving on the governing body of a supported organization? If "No," explain in <b>Part VI</b> how the organization maintained a close and continuous working relationship with the supported organization(s).		
<b>3</b> By reason of the relationship described on line 2, above, did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? If "Yes," describe in <b>Part VI</b> the role the organization's supported organizations played in this regard.		

**Section E. Type III Functionally Integrated Supporting Organizations**

**1** Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions).

**a** ☐ The organization satisfied the Activities Test. Complete **line 2** below.

**b** ☐ The organization is the parent of each of its supported organizations. Complete **line 3** below.

**c** ☐ The organization supported a governmental entity. Describe in **Part VI** how you supported a governmental entity (see instructions).

**2** Activities Test. **Answer lines 2a and 2b below.**

	Yes	No
<b>a</b> Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? If "Yes," then in <b>Part VI</b> identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.		
<b>b</b> Did the activities described on line 2a, above, constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? If "Yes," explain in <b>Part VI</b> the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.		

**3** Parent of Supported Organizations. **Answer lines 3a and 3b below.**

	Yes	No
<b>a</b> Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? If "Yes" or "No," provide details in <b>Part VI</b> .		
<b>b</b> Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? If "Yes," describe in <b>Part VI</b> the role played by the organization in this regard.		

**Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations**

- 1 ☐ Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970 (explain in Part VI). **See instructions.** All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

Section A – Adjusted Net Income		(A) Prior Year	(B) Current Year (optional)
1	Net short-term capital gain	1	
2	Recoveries of prior-year distributions	2	
3	Other gross income (see instructions)	3	
4	Add lines 1 through 3.	4	
5	Depreciation and depletion	5	
6	Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	6	
7	Other expenses (see instructions)	7	
8	<b>Adjusted Net Income</b> (subtract lines 5, 6, and 7 from line 4)	8	

Section B – Minimum Asset Amount		(A) Prior Year	(B) Current Year (optional)
1	Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):		
a	Average monthly value of securities	1a	
b	Average monthly cash balances	1b	
c	Fair market value of other non-exempt-use assets	1c	
d	<b>Total</b> (add lines 1a, 1b, and 1c)	1d	
e	<b>Discount</b> claimed for blockage or other factors (explain in detail in <b>Part VI</b> ):		
2	Acquisition indebtedness applicable to non-exempt-use assets	2	
3	Subtract line 2 from line 1d.	3	
4	Cash deemed held for exempt use. Enter 0.015 of line 3 (for greater amount, see instructions).	4	
5	Net value of non-exempt-use assets (subtract line 4 from line 3)	5	
6	Multiply line 5 by 0.035.	6	
7	Recoveries of prior-year distributions	7	
8	<b>Minimum Asset Amount</b> (add line 7 to line 6)	8	

Section C – Distributable Amount			Current Year
1	Adjusted net income for prior year (from Section A, line 8, column A)	1	
2	Enter 0.85 of line 1.	2	
3	Minimum asset amount for prior year (from Section B, line 8, column A)	3	
4	Enter greater of line 2 or line 3.	4	
5	Income tax imposed in prior year	5	
6	<b>Distributable Amount.</b> Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions).	6	
7	<input type="checkbox"/> Check here if the current year is the organization's first as a non-functionally integrated Type III supporting organization (see instructions).		

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Schedule A (Form 990) 2023

**Part V** Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations (continued)**Section D – Distributions**

		Current Year
1	Amounts paid to supported organizations to accomplish exempt purposes	1
2	Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	2
3	Administrative expenses paid to accomplish exempt purposes of supported organizations	3
4	Amounts paid to acquire exempt-use assets	4
5	Qualified set-aside amounts (prior IRS approval required – <i>provide details in Part VI</i> )	5
6	Other distributions (describe in <b>Part VI</b> ). See instructions.	6
7	<b>Total annual distributions.</b> Add lines 1 through 6.	7
8	Distributions to attentive supported organizations to which the organization is responsive (provide details in <b>Part VI</b> ). See instructions.	8
9	Distributable amount for 2023 from Section C, line 6	9
10	Line 8 amount divided by line 9 amount	10

**Section E – Distribution Allocations (see instructions)**

	(i) Excess Distributions	(ii) Underdistributions Pre-2023	(iii) Distributable Amount for 2023
1	Distributable amount for 2023 from Section C, line 6		
2	Underdistributions, if any, for years prior to 2023 (reasonable cause required – <i>explain in Part VI</i> ). See instructions.		
3	Excess distributions carryover, if any, to 2023		
a	From 2018 .....		
b	From 2019 .....		
c	From 2020 .....		
d	From 2021 .....		
e	From 2022 .....		
f	<b>Total</b> of lines 3a through 3e		
g	Applied to underdistributions of prior years		
h	Applied to 2023 distributable amount		
i	Carryover from 2018 not applied (see instructions)		
j	Remainder. Subtract lines 3g, 3h, and 3i from line 3f.		
4	Distributions for 2023 from Section D, line 7: \$		
a	Applied to underdistributions of prior years		
b	Applied to 2023 distributable amount		
c	Remainder. Subtract lines 4a and 4b from line 4.		
5	Remaining underdistributions for years prior to 2023, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, <i>explain in Part VI</i> . See instructions.		
6	Remaining underdistributions for 2023. Subtract lines 3h and 4b from line 1. For result greater than zero, <i>explain in Part VI</i> . See instructions.		
7	<b>Excess distributions carryover to 2024.</b> Add lines 3j and 4c.		
8	Breakdown of line 7:		
a	Excess from 2019 .....		
b	Excess from 2020 .....		
c	Excess from 2021 .....		
d	Excess from 2022 .....		
e	Excess from 2023 .....		

BAA

Schedule A (Form 990) 2023

**Part VI**

**Supplemental Information.** Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a, and 3b; Part V, line 1; Part V, Section B, line 1e; Part V, Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information. (See instructions.)

Client Copy



**Schedule B  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Schedule of Contributors**

Attach to Form 990, 990-EZ, or 990-PF.  
Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No. 1545-0047

**2023**

Name of the organization

CAPITAL DISTRICT KIWANIS FOUNDATION

Employer identification number

23-7226256

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

☒ 501(c)( 3 ) (enter number) organization

☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

☐ 527 political organization

Form 990-PF

☐ 501(c)(3) exempt private foundation

☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation

☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

**Note:** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

**General Rule**

- ☐ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

**Special Rules**

- ☒ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33-1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000; or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h; or (ii) Form 990-EZ, line 1. Complete Parts I and II.

- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I (entering "N/A" in column (b) instead of the contributor name and address), II, and III.

- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year. . . . . \$ \_\_\_\_\_

**Caution:** An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990).

Name of organization

Employer identification number

CAPITAL DISTRICT KIWANIS FOUNDATION

23-7226256

**Part I Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	KIWANIS CLUB OF WILMINGTON 669 S. UNION STREET WILMINGTON, DE 19805	\$ 15,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization

Employer identification number

CAPITAL DISTRICT KIWANIS FOUNDATION

23-7226256

**Part II** **Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
	N/A		
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		\$	

Name of organization

CAPITAL DISTRICT KIWANIS FOUNDATION

Employer identification number

23-7226256

**Part III** **Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor.** Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of **\$1,000 or less** for the year. (Enter this information once. See instructions.)..... \$                      N/A  
Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	N/A		
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

**SCHEDULE D  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

Name of the organization

**Supplemental Financial Statements**

Complete if the organization answered "Yes" on Form 990,  
Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.  
Attach to Form 990.

Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No. 1545-0047

**2023**

**Open to Public  
Inspection**

Employer identification number

CAPITAL DISTRICT KIWANIS FOUNDATION

23-7226256

**Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts**

Complete if the organization answered "Yes" on Form 990, Part IV, line 6.

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year .....		
2 Aggregate value of contributions to (during year) .....		
3 Aggregate value of grants from (during year) .....		
4 Aggregate value at end of year .....		
5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control? .....	<input type="checkbox"/> Yes	<input type="checkbox"/> No
6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit? .....	<input type="checkbox"/> Yes	<input type="checkbox"/> No

**Part II Conservation Easements**

Complete if the organization answered "Yes" on Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply).

<input type="checkbox"/> Preservation of land for public use (for example, recreation or education)	<input type="checkbox"/> Preservation of a historically important land area
<input type="checkbox"/> Protection of natural habitat	<input type="checkbox"/> Preservation of a certified historic structure
<input type="checkbox"/> Preservation of open space	

2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.

	Held at the End of the Tax Year
a Total number of conservation easements .....	2a
b Total acreage restricted by conservation easements .....	2b
c Number of conservation easements on a certified historic structure included on line 2a .....	2c
d Number of conservation easements included on line 2c acquired after July 25, 2006, and not on a historic structure listed in the National Register .....	2d

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year .....

4 Number of states where property subject to conservation easement is located .....

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? .....

☐ Yes ☐ No

6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year .....

7 Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year .....

8 Does each conservation easement reported on line 2d above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? .....

☐ Yes ☐ No

9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets**

Complete if the organization answered "Yes" on Form 990, Part IV, line 8.

1a If the organization elected, as permitted under FASB ASC 958, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide in Part XIII the text of the footnote to its financial statements that describes these items.

b If the organization elected, as permitted under FASB ASC 958, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items.

(i) Revenue included on Form 990, Part VIII, line 1 .....

(ii) Assets included in Form 990, Part X .....

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under FASB ASC 958 relating to these items.

a Revenue included on Form 990, Part VIII, line 1 .....

b Assets included in Form 990, Part X .....

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets** (continued)

3 Using the organization's acquisition, accession, and other records, check any of the following that make significant use of its collection items (check all that apply).

a ☐ Public exhibition

b ☐ Scholarly research

c ☐ Preservation for future generations

d ☐ Loan or exchange program

e ☐ Other \_\_\_\_\_

4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.

5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? ☐ Yes ☐ No

**Part IV Escrow and Custodial Arrangements**

Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

1a Is the organization an agent, trustee, custodian, or other intermediary for contributions or other assets not included on Form 990, Part X? ☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIII and complete the following table.

c Beginning balance.

d Additions during the year.

e Distributions during the year.

f Ending balance.

	Amount
1c	
1d	
1e	
1f	

2a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? ☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided in Part XIII. ☐

**Part V Endowment Funds**

Complete if the organization answered "Yes" on Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a Beginning of year balance.	579,175.	576,115.	571,465.	567,165.	562,215.
b Contributions.	2,355.	3,060.	4,650.	4,300.	4,950.
c Net investment earnings, gains, and losses.					
d Grants or scholarships.					
e Other expenditures for facilities and programs.				0.	
f Administrative expenses.					
g End of year balance.	581,530.	579,175.	576,115.	571,465.	567,165.

2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:

a Board designated or quasi-endowment \_\_\_\_\_ %

b Permanent endowment 100.00 %

c Term endowment \_\_\_\_\_ %

The percentages on lines 2a, 2b, and 2c should equal 100%.

3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:

(i) Unrelated organizations? ☐ Yes ☒ No

(ii) Related organizations? ☐ Yes ☒ No

b If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R? ☐ Yes ☐ No

4 Describe in Part XIII the intended uses of the organization's endowment funds.

**Part VI Land, Buildings, and Equipment**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land.				
b Buildings.				
c Leasehold improvements.				
d Equipment.				
e Other.				

Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, line 10c, column (B)). 0.

**Part VII Investments – Other Securities**

N/A

Complete if the organization answered "Yes" on Form 990, Part IV, line 11b. See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) Financial derivatives.....		
(2) Closely held equity interests.....		
(3) Other .....		
(A) .....		
(B) .....		
(C) .....		
(D) .....		
(E) .....		
(F) .....		
(G) .....		
(H) .....		
(I) .....		
<b>Total.</b> (Column (b) must equal Form 990, Part X, line 12, column (B)).....		

**Part VIII Investments – Program Related**

N/A

Complete if the organization answered "Yes" on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

(a) Description of investment	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) .....		
(2) .....		
(3) .....		
(4) .....		
(5) .....		
(6) .....		
(7) .....		
(8) .....		
(9) .....		
(10) .....		
<b>Total.</b> (Column (b) must equal Form 990, Part X, line 13, column (B)).....		

**Part IX Other Assets**

N/A

Complete if the organization answered "Yes" on Form 990, Part IV, line 11d. See Form 990, Part X, line 15.

(a) Description	(b) Book value
(1) .....	
(2) .....	
(3) .....	
(4) .....	
(5) .....	
(6) .....	
(7) .....	
(8) .....	
(9) .....	
(10) .....	
<b>Total.</b> (Column (b) must equal Form 990, Part X, line 15, column (B)).....	

**Part X Other Liabilities**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25.

1. (a) Description of liability	(b) Book value
(1) Federal income taxes.....	
(2) .....	
(3) .....	
(4) .....	
(5) .....	
(6) .....	
(7) .....	
(8) .....	
(9) .....	
(10) .....	
(11) .....	
<b>Total.</b> (Column (b) must equal Form 990, Part X, line 25, column (B)).....	

2. Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FASB ASC 740. Check here if the text of the footnote has been provided in Part XIII. **SEE PART XIII.** ☒

**Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return**

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

<b>1</b>	Total revenue, gains, and other support per audited financial statements .....	<b>1</b>	380,245.
<b>2</b>	Amounts included on line 1 but not on Form 990, Part VIII, line 12:		
<b>a</b>	Net unrealized gains (losses) on investments .....	<b>2a</b>	213,178.
<b>b</b>	Donated services and use of facilities .....	<b>2b</b>	
<b>c</b>	Recoveries of prior year grants .....	<b>2c</b>	
<b>d</b>	Other (Describe in Part XIII.) SEE PART XIII .....	<b>2d</b>	3,029.
<b>e</b>	Add lines <b>2a</b> through <b>2d</b> .....	<b>2e</b>	216,207.
<b>3</b>	Subtract line <b>2e</b> from line <b>1</b> .....	<b>3</b>	164,038.
<b>4</b>	Amounts included on Form 990, Part VIII, line 12, but not on line 1:		
<b>a</b>	Investment expenses not included on Form 990, Part VIII, line 7b .....	<b>4a</b>	
<b>b</b>	Other (Describe in Part XIII.) .....	<b>4b</b>	
<b>c</b>	Add lines <b>4a</b> and <b>4b</b> .....	<b>4c</b>	
<b>5</b>	Total revenue. Add lines <b>3</b> and <b>4c</b> . (This must equal Form 990, Part I, line 12.) .....	<b>5</b>	164,038.

**Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return**

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

<b>1</b>	Total expenses and losses per audited financial statements .....	<b>1</b>	104,477.
<b>2</b>	Amounts included on line 1 but not on Form 990, Part IX, line 25:		
<b>a</b>	Donated services and use of facilities .....	<b>2a</b>	
<b>b</b>	Prior year adjustments .....	<b>2b</b>	
<b>c</b>	Other losses .....	<b>2c</b>	
<b>d</b>	Other (Describe in Part XIII.) SEE PART XIII .....	<b>2d</b>	3,029.
<b>e</b>	Add lines <b>2a</b> through <b>2d</b> .....	<b>2e</b>	3,029.
<b>3</b>	Subtract line <b>2e</b> from line <b>1</b> .....	<b>3</b>	101,448.
<b>4</b>	Amounts included on Form 990, Part IX, line 25, but not on line 1:		
<b>a</b>	Investment expenses not included on Form 990, Part VIII, line 7b .....	<b>4a</b>	
<b>b</b>	Other (Describe in Part XIII.) .....	<b>4b</b>	
<b>c</b>	Add lines <b>4a</b> and <b>4b</b> .....	<b>4c</b>	
<b>5</b>	Total expenses. Add lines <b>3</b> and <b>4c</b> . (This must equal Form 990, Part I, line 18.) .....	<b>5</b>	101,448.

**Part XIII Supplemental Information**

Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

**PART X - FASB ASC 740 FOOTNOTE**

THE FOUNDATION IS AN INCOME TAX-EXEMPT ORGANIZATION UNDER SECTION 501(C)(3) OF THE INTERNAL REVENUE CODE AND IS NOT CLASSIFIED AS A PRIVATE FOUNDATION. THE FOUNDATION BELIEVES THAT IT HAS APPROPRIATE SUPPORT FOR ANY INCOME TAX POSITIONS TAKEN, AND AS SUCH, DOES NOT HAVE ANY UNCERTAIN INCOME TAX POSITIONS THAT ARE REQUIRED TO BE RECORDED IN THE FINANCIAL STATEMENTS.

THERE CAN BE NO ASSURANCES THAT THE FOUNDATION'S INCOME TAX RETURNS WILL NOT BE

BAA

Schedule D (Form 990) 2023



**Part XIII** Supplemental Information (continued)**PART X - FASB ASC 740 FOOTNOTE (CONTINUED)**

CHALLENGED BY THE INCOME TAXING AUTHORITIES AND THAT THE FOUNDATION WILL NOT BE SUBJECT TO INCOME TAXES, PENALTIES, AND INTEREST AS A RESULT OF SUCH A CHALLENGE. SHOULD ANY SUCH PENALTIES AND INTEREST BE INCURRED, THE FOUNDATION'S POLICY IS TO RECOGNIZE THEM AS MANAGEMENT AND GENERAL EXPENSES. WITH LIMITED EXCEPTIONS, THE FOUNDATION IS NO LONGER SUBJECT TO INCOME TAX EXAMINATIONS FOR ANY YEARS EARLIER THAN 2020 FOR FEDERAL PURPOSES.

**SCHEDULE D, PART XI, LINE 2D****OTHER REVENUE INCLUDED IN F/S BUT NOT INCLUDED ON FORM 990**

DIRECT EXPENSE FROM FUNDRAISING EVENTS.....	\$	3,029.
TOTAL	\$	<u>3,029.</u>

**SCHEDULE D, PART XII, LINE 2D****OTHER EXPENSES AND LOSSES PER AUDITED F/S**

DIRECT EXPENSES FROM FUNDRAISING EVENTS.....	\$	3,029.
TOTAL	\$	<u>3,029.</u>

SCHEDULE G  
(Form 990)

Department of the Treasury  
Internal Revenue Service

Supplemental Information Regarding Fundraising or Gaming Activities

Complete if the organization answered "Yes" on Form 990, Part IV, line 17, 18, or 19, or if the organization entered more than \$15,000 on Form 990-EZ, line 6a.

Attach to Form 990 or Form 990-EZ.

Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No. 1545-0047

2023

Open to Public  
Inspection

Name of the organization

CAPITAL DISTRICT KIWANIS FOUNDATION

Employer identification number

23-7226256

**Part I** Fundraising Activities. Complete if the organization answered "Yes" on Form 990, Part IV, line 17.  
Form 990-EZ filers are not required to complete this part.

1 Indicate whether the organization raised funds through any of the following activities. Check all that apply.

- a ☒ Mail solicitations e ☒ Solicitation of non-government grants  
b ☒ Internet and email solicitations f ☒ Solicitation of government grants  
c ☒ Phone solicitations g ☒ Special fundraising events  
d ☒ In-person solicitations

2a Did the organization have a written or oral agreement with any individual (including officers, directors, trustees, or key employees listed in Form 990, Part VII) or entity in connection with professional fundraising services? ☐ Yes ☒ No

b If "Yes," list the 10 highest paid individuals or entities (fundraisers) pursuant to agreements under which the fundraiser is to be compensated at least \$5,000 by the organization.

(i) Name and address of individual or entity (fundraiser)	(ii) Activity	(iii) Did fundraiser have custody or control of contributions?		(iv) Gross receipts from activity	(v) Amount paid to (or retained by) fundraiser listed in column (i)	(vi) Amount paid to (or retained by) organization
		Yes	No			
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
Total						0.

3 List all states in which the organization is registered or licensed to solicit contributions or has been notified it is exempt from registration or licensing.

**Part II Fundraising Events.** Complete if the organization answered "Yes" on Form 990, Part IV, line 18, or reported more than \$15,000 of fundraising event contributions and gross income on Form 990-EZ, lines 1 and 6b. List events with gross receipts greater than \$5,000.

		(a) Event #1 <u>DUCKY DERBY</u> (event type)	(b) Event #2 <u>ANNUAL CLUB</u> (event type)	(c) Other events <u>NONE</u> (total number)	(d) Total events (add column (a) through column (c))
Revenue	1 Gross receipts .....	17,170.	12,095.		29,265.
	2 Less: Contributions .....	17,170.	12,095.		29,265.
	3 Gross income (line 1 minus line 2) .....				
Direct Expenses	4 Cash prizes .....				
	5 Noncash prizes .....				
	6 Rent/facility costs .....				
	7 Food and beverages .....				
	8 Entertainment .....				
	9 Other direct expenses .....	2,398.	486.		2,884.
	10 Direct expense summary. Add lines 4 through 9 in column (d) .....				2,884.
	11 Net income summary. Subtract line 10 from line 3, column (d) .....				-2,884.

**Part III Gaming.** Complete if the organization answered "Yes" on Form 990, Part IV, line 19, or reported more than \$15,000 on Form 990-EZ, line 6a.

		(a) Bingo	(b) Pull tabs/instant bingo/progressive bingo	(c) Other gaming	(d) Total gaming (add column (a) through column (c))
Revenue	1 Gross revenue .....				
Direct Expenses	2 Cash prizes .....				
	3 Noncash prizes .....				
	4 Rent/facility costs .....				
	5 Other direct expenses .....				
	6 Volunteer labor .....	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	
	7 Direct expense summary. Add lines 2 through 5 in column (d) .....				
	8 Net gaming income summary. Subtract line 7 from line 1, column (d) .....				

9 Enter the state(s) in which the organization conducts gaming activities: \_\_\_\_\_

a Is the organization licensed to conduct gaming activities in each of these states? ☐ Yes ☐ No

b If "No," explain: \_\_\_\_\_

10 a Were any of the organization's gaming licenses revoked, suspended, or terminated during the tax year? ☐ Yes ☐ No

b If "Yes," explain: \_\_\_\_\_

- 11 Does the organization conduct gaming activities with nonmembers? ☐ Yes ☐ No
- 12 Is the organization a grantor, beneficiary or trustee of a trust, or a member of a partnership or other entity formed to administer charitable gaming? ☐ Yes ☐ No
- 13 Indicate the percentage of gaming activity conducted in:
- |                               |     |   |
|-------------------------------|-----|---|
| a The organization's facility | 13a | % |
| b An outside facility         | 13b | % |
- 14 Enter the name and address of the person who prepares the organization's gaming/special events books and records:

Name

Address

- 15a Does the organization have a contract with a third party from whom the organization receives gaming revenue? ☐ Yes ☐ No
- b If "Yes," enter the amount of gaming revenue received by the organization \$ \_\_\_\_\_ and the amount of gaming revenue retained by the third party \$ \_\_\_\_\_
- c If "Yes," enter name and address of the third party:

Name

Address

## 16 Gaming manager information:

Name

Gaming manager compensation \$ \_\_\_\_\_

Description of services provided \_\_\_\_\_

☐

Director/officer

☐

Employee

☐

Independent contractor

## 17 Mandatory distributions:

- a Is the organization required under state law to make charitable distributions from the gaming proceeds to retain the state gaming license? ☐ Yes ☐ No
- b Enter the amount of distributions required under state law to be distributed to other exempt organizations or spent in the organization's own exempt activities during the tax year. . . \$ \_\_\_\_\_

**Part IV** **Supplemental Information.** Provide the explanations required by Part I, line 2b, columns (iii) and (v); and Part III, lines 9, 9b, 10b, 15b, 15c, 16, and 17b, as applicable. Also provide any additional information. See instructions.

**SCHEDULE O  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

Name of the organization

**Supplemental Information to Form 990 or 990-EZ**

Complete to provide information for responses to specific questions on  
Form 990 or 990-EZ or to provide any additional information.  
Attach to Form 990 or Form 990-EZ.

Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No. 1545-0047

**2023**

**Open to Public  
Inspection**

CAPITAL DISTRICT KIWANIS FOUNDATION

Employer identification number

23-7226256

**FORM 990, PART I, LINE 1 - ORGANIZATION MISSION OR SIGNIFICANT ACTIVITIES**

TO AID AND PROMOTE COMMUNITY SERVICE THROUGH FINANCIAL ASSISTANCE TO OUR DISTRICT'S CLUBS; TO EXPEND FUNDS TO CARE FOR, TREAT, AND REHABILITATE INDIVIDUALS WITH DISABILITIES, PARTICULARLY CHILDREN EXPERIENCING TRAUMA; AND TO ASSIST KIWANIS' SPONSORED YOUTH ACTIVITIES WITH SCHOLARSHIPS AND GRANTS.

**FORM 990, PART III, LINE 1 - ORGANIZATION MISSION**

TO AID AND PROMOTE COMMUNITY SERVICE THROUGH FINANCIAL ASSISTANCE TO OUR DISTRICT'S CLUBS; TO EXPEND FUNDS TO CARE FOR, TREAT, AND REHABILITATE INDIVIDUALS WITH DISABILITIES, PARTICULARLY CHILDREN EXPERIENCING TRAUMA; AND TO ASSIST KIWANIS' SPONSORED YOUTH ACTIVITIES WITH SCHOLARSHIPS AND GRANTS.

**FORM 990, PART III, LINE 4D - OTHER PROGRAM SERVICES DESCRIPTION**

OTHER PROGRAM EXPENSES

**FORM 990, PART VI, LINE 11B - FORM 990 REVIEW PROCESS**

THE TREASURER FORWARDS THE DRAFT 990 TO THE EXECUTIVE SECRETARY FOR DISSEMINATION TO THE BOARD. THE BOARD REVIEWS AND PROVIDES ELECTRONIC APPROVAL. SHOULD THERE BE ISSUES, THE BOARD MEETS. UPON ACCEPTANCE, THE EXECUTIVE SECRETARY NOTIFIES THE ACCOUNTANT WHO SUBMITS THE 990 TO THE IRS. THE EXECUTIVE SECRETARY RETAINS A COPY AND SENDS A COPY TO THE CAPITAL DISTRICT KIWANIS' EXECUTIVE DIRECTOR.

**FORM 990, PART VI, LINE 12C - EXPLANATION OF MONITORING AND ENFORCEMENT OF CONFLICTS**

BOARD MEMBERS ARE REQUIRED TO FOLLOW THE CONFLICT OF INTEREST POLICY IN ORDER TO JOIN AND CONTINUE SERVICE ON THE BOARD.

**FORM 990, PART VI, LINE 19 - OTHER ORGANIZATION DOCUMENTS PUBLICLY AVAILABLE**

THE FOUNDATION'S GOVERNING DOCUMENTS, WHICH INCLUDES BY-LAWS AND CONFLICTS OF INTEREST AND OTHER POLICIES, ARE POSTED TO THE FOUNDATIONS'S WEBSITE AND AVAILABLE UPON REQUEST. FINANCIAL STATEMENTS ARE AVAILABLE BY REQUEST ONLY. THE FOUNDATION'S

Name of the organization

CAPITAL DISTRICT KIWANIS FOUNDATION

Employer identification number

23-7226256

**FORM 990, PART VI, LINE 19 - OTHER ORGANIZATION DOCUMENTS PUBLICLY AVAILABLE (CONTINUED)**

FORM 990 IS POSTED ONLINE BY VARIOUS WATCHDOG ORGANIZATIONS, SUCH AS  
WWW.GUIDESTAR.ORG AND WWW.CHARITYNAVIGATOR.ORG.

Client Copy

## CAPITAL DISTRICT KIWANIS FOUNDATION

23-7226256

	2023	2022	DIFF
<b>REVENUE</b>			
CONTRIBUTIONS AND GRANTS.....	65,897	49,203	16,694
INVESTMENT INCOME.....	101,170	59,669	41,501
OTHER REVENUE.....	-3,029	-3,424	395
<b>TOTAL REVENUE.....</b>	<b>164,038</b>	<b>105,448</b>	<b>58,590</b>
<b>EXPENSES</b>			
GRANTS AND SIMILAR AMOUNTS PAID.....	83,848	85,539	-1,691
OTHER EXPENSES.....	17,600	11,676	5,924
<b>TOTAL EXPENSES.....</b>	<b>101,448</b>	<b>97,215</b>	<b>4,233</b>
<b>NET ASSETS OR FUND BALANCES</b>			
REVENUE LESS EXPENSES.....	62,590	8,233	54,357
TOTAL ASSETS AT END OF YEAR.....	1,606,186	1,330,418	275,768
TOTAL LIABILITIES AT END OF YEAR.....	0	0	0
NET ASSETS/FUND BALANCES AT END OF YEAR.	1,606,186	1,330,418	275,768

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Form

990

Department of the Treasury  
Internal Revenue Service

Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

Do not enter social security numbers on this form as it may be made public.  
Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No. 1545-0047

2023

Open to Public Inspection

A For the 2023 calendar year, or tax year beginning 10/01/23 , and ending 09/30/24

B Check if applicable:

☐ Address change

☐ Name change

☐ Initial return

☐ Final return/terminated

☐ Amended return

☐ Application pending

C Name of organization

CAPITAL DISTRICT OF KIWANIS INTERNATIONAL, INC.

Doing business as

Number and street (or P.O. box if mail is not delivered to street address)

4410 BROOKFIELD CORPORATE DR 220469

Room/suite

City or town, state or province, country, and ZIP or foreign postal code

CHANTILLY VA 20153-0469

D Employer identification number

54-0160298

E Telephone number

703-544-5655

G Gross receipts \$

705,885

F Name and address of principal officer:

JEFFREY WOLFF

4410 BROOKFIELD CORPORATE DR 220469

CHANTILLY VA 20153-0469

H(a) Is this a group return for subordinates?

☐ Yes ☒ No

H(b) Are all subordinates included?

☐ Yes ☐ No

If "No," attach a list. See instructions

I Tax-exempt status:

☐ 501(c)(3) ☒ 501(c) ( 4 ) (insert no.) ☐ 4947(a)(1) or ☐ 527

J Website:

K03.SITE.KIWANIS.ORG

H(c) Group exemption number

K Form of organization:

☒ Corporation ☐ Trust ☐ Association ☐ Other

L Year of formation:

1919

M State of legal domicile:

MD

Part I Summary

Activities & Governance

1 Briefly describe the organization's mission or most significant activities:

SEE SCHEDULE O

2 Check this box ☐ if the organization discontinued its operations or disposed of more than 25% of its net assets.

3 Number of voting members of the governing body (Part VI, line 1a)

4 Number of independent voting members of the governing body (Part VI, line 1b)

5 Total number of individuals employed in calendar year 2023 (Part V, line 2a)

6 Total number of volunteers (estimate if necessary)

7a Total unrelated business revenue from Part VIII, column (C), line 12

7b Net unrelated business taxable income from Form 990-T, Part I, line 11

Revenue

8 Contributions and grants (Part VIII, line 1h)

9 Program service revenue (Part VIII, line 2g)

10 Investment income (Part VIII, column (A), lines 3, 4, and 7d)

11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)

12 Total revenue – add lines 8 through 11 (must equal Part VIII, column (A), line 12)

Expenses

13 Grants and similar amounts paid (Part IX, column (A), lines 1–3)

14 Benefits paid to or for members (Part IX, column (A), line 4)

15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)

16a Professional fundraising fees (Part IX, column (A), line 11e)

b Total fundraising expenses (Part IX, column (D), line 25)

17 Other expenses (Part IX, column (A), lines 11a–11d, 11f–24e)

18 Total expenses. Add lines 13–17 (must equal Part IX, column (A), line 25)

19 Revenue less expenses. Subtract line 18 from line 12

Net Assets or Fund Balances

20 Total assets (Part X, line 16)

21 Total liabilities (Part X, line 26)

22 Net assets or fund balances. Subtract line 21 from line 20

	Prior Year	Current Year
3	11	
4	11	
5	0	
6	200	
7a	0	
7b	0	
8	186,946	189,539
9	190,073	217,986
10	-8,354	26,183
11	0	11,638
12	368,665	445,346
13	55,238	0
14		0
15	46,800	46,800
16a		0
b	0	
17	358,680	390,367
18	460,718	437,167
19	-92,053	8,179
20	1,019,279	1,195,645
21	2,000	1,152
22	1,017,279	1,194,493

Part II Signature Block

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Sign Here

Signature of officer

JEFFREY WOLFF

EXECUTIVE DIRECTOR

Type or print name and title

Date

Paid Preparer Use Only

Print/Type preparer's name

DUSTIN W DIDAWICK CPA

Preparer's signature

DUSTIN W DIDAWICK CPA

Date

07/24/25

Check ☐ if self-employed

PTIN

P01338204

Firm's name

DIDAWICK & COMPANY, P.C.

Firm's EIN

54-1384711

Firm's address

P.O. BOX 2976

STAUNTON, VA 24402

Phone no.

540-885-0855

May the IRS discuss this return with the preparer shown above? See instructions ☒ Yes ☐ No

For Paperwork Reduction Act Notice, see the separate instructions.

DAA

Form 990 (2023)



**Part III Statement of Program Service Accomplishments**

Check if Schedule O contains a response or note to any line in this Part III

**1** Briefly describe the organization's mission:**SEE SCHEDULE O****2** Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ?☐ Yes ☒ No

If "Yes," describe these new services on Schedule O.

**3** Did the organization cease conducting, or make significant changes in how it conducts, any program services?☐ Yes ☒ No

If "Yes," describe these changes on Schedule O.

**4** Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.**4a** (Code: ) (Expenses \$ **222,980** including grants of \$ ) (Revenue \$ **100,280** )  
**KIWANIS - CONVENTIONS, CONFERENCES, TRAINING, ELECTIONS, OFFICER EDUCATION****4b** (Code: ) (Expenses \$ **164,782** including grants of \$ ) (Revenue \$ **116,060** )  
**KEY CLUB - PROVIDED FUNDRAISING FOR DISTRICT PROJECTS AND TRAINING FOR YOUTH THROUGH CONVENTIONS, CONFERENCES, AND MEETINGS****4c** (Code: ) (Expenses \$ **5,118** including grants of \$ ) (Revenue \$ **1,646** )  
**CIRCLE K - LEADERSHIP EDUCATION AND DEVELOPMENT FOR COLLEGE-AGED ADULTS****4d** Other program services (Describe on Schedule O.)

(Expenses \$ including grants of \$ ) (Revenue \$ )

**4e** Total program service expenses **392,880**

**Part IV Checklist of Required Schedules**

	Yes	No
<b>1</b> Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If "Yes," complete Schedule A		<b>X</b>
<b>2</b> Is the organization required to complete Schedule B, Schedule of Contributors? See instructions		<b>X</b>
<b>3</b> Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I		<b>X</b>
<b>4 Section 501(c)(3) organizations.</b> Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? If "Yes," complete Schedule C, Part II		
<b>5</b> Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Rev. Proc. 98-19? If "Yes," complete Schedule C, Part III	<b>X</b>	
<b>6</b> Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If "Yes," complete Schedule D, Part I		<b>X</b>
<b>7</b> Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? If "Yes," complete Schedule D, Part II		<b>X</b>
<b>8</b> Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete Schedule D, Part III		<b>X</b>
<b>9</b> Did the organization report an amount in Part X, line 21, for escrow or custodial account liability; serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? If "Yes," complete Schedule D, Part IV		<b>X</b>
<b>10</b> Did the organization, directly or through a related organization, hold assets in donor-restricted endowments or in quasi-endowments? If "Yes," complete Schedule D, Part V		<b>X</b>
<b>11</b> If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X, as applicable.		
<b>a</b> Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes," complete Schedule D, Part VI		<b>X</b>
<b>b</b> Did the organization report an amount for investments—other securities in Part X, line 12, that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII		<b>X</b>
<b>c</b> Did the organization report an amount for investments—program related in Part X, line 13, that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VIII		<b>X</b>
<b>d</b> Did the organization report an amount for other assets in Part X, line 15, that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part IX		<b>X</b>
<b>e</b> Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X		<b>X</b>
<b>f</b> Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? If "Yes," complete Schedule D, Part X		<b>X</b>
<b>12a</b> Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete Schedule D, Parts XI and XII		<b>X</b>
<b>b</b> Was the organization included in consolidated, independent audited financial statements for the tax year? If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional		<b>X</b>
<b>13</b> Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E		<b>X</b>
<b>14a</b> Did the organization maintain an office, employees, or agents outside of the United States?		<b>X</b>
<b>b</b> Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? If "Yes," complete Schedule F, Parts I and IV		<b>X</b>
<b>15</b> Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? If "Yes," complete Schedule F, Parts II and IV		<b>X</b>
<b>16</b> Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? If "Yes," complete Schedule F, Parts III and IV		<b>X</b>
<b>17</b> Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? If "Yes," complete Schedule G, Part I. See instructions		<b>X</b>
<b>18</b> Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? If "Yes," complete Schedule G, Part II		<b>X</b>
<b>19</b> Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If "Yes," complete Schedule G, Part III		<b>X</b>
<b>20a</b> Did the organization operate one or more hospital facilities? If "Yes," complete Schedule H		<b>X</b>
<b>b</b> If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?		
<b>21</b> Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? If "Yes," complete Schedule I, Parts I and II		<b>X</b>

**Part IV Checklist of Required Schedules (continued)**

	Yes	No
<b>22</b> Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? <i>If "Yes," complete Schedule I, Parts I and III</i>		<b>X</b>
<b>23</b> Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If "Yes," complete Schedule J</i>		<b>X</b>
<b>24a</b> Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a</i>		<b>X</b>
<b>b</b> Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?		
<b>c</b> Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?		
<b>d</b> Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?		
<b>25a</b> <b>Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations.</b> Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I</i>		<b>X</b>
<b>b</b> Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If "Yes," complete Schedule L, Part I</i>		<b>X</b>
<b>26</b> Did the organization report any amount on Part X, line 5 or 22, for receivables from or payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons? <i>If "Yes," complete Schedule L, Part II</i>		<b>X</b>
<b>27</b> Did the organization provide a grant or other assistance to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity (including an employee thereof) or family member of any of these persons? <i>If "Yes," complete Schedule L, Part III</i>		<b>X</b>
<b>28</b> Was the organization a party to a business transaction with one of the following parties? (See the Schedule L, Part IV, instructions for applicable filing thresholds, conditions, and exceptions).		
<b>a</b> A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? <i>If "Yes," complete Schedule L, Part IV</i>		<b>X</b>
<b>b</b> A family member of any individual described in line 28a? <i>If "Yes," complete Schedule L, Part IV</i>		<b>X</b>
<b>c</b> A 35% controlled entity of one or more individuals and/or organizations described in line 28a or 28b? <i>If "Yes," complete Schedule L, Part IV</i>		<b>X</b>
<b>29</b> Did the organization receive more than \$25,000 in noncash contributions? <i>If "Yes," complete Schedule M</i>		<b>X</b>
<b>30</b> Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M</i>		<b>X</b>
<b>31</b> Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i>		<b>X</b>
<b>32</b> Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II</i>		<b>X</b>
<b>33</b> Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I</i>		<b>X</b>
<b>34</b> Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1</i>		<b>X</b>
<b>35a</b> Did the organization have a controlled entity within the meaning of section 512(b)(13)?		<b>X</b>
<b>b</b> If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," complete Schedule R, Part V, line 2</i>		
<b>36</b> <b>Section 501(c)(3) organizations.</b> Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2</i>		
<b>37</b> Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If "Yes," complete Schedule R, Part VI</i>		<b>X</b>
<b>38</b> Did the organization complete Schedule O and provide explanations on Schedule O for Part VI, lines 11b and 19? <b>Note:</b> All Form 990 filers are required to complete Schedule O.	<b>X</b>	

**Part V Statements Regarding Other IRS Filings and Tax Compliance**Check if Schedule O contains a response or note to any line in this Part V ☐

	Yes	No
<b>1a</b> Enter the number reported in box 3 of Form 1096. Enter -0- if not applicable	<b>1a</b>	<b>3</b>
<b>b</b> Enter the number of Forms W-2G included on line 1a. Enter -0- if not applicable	<b>1b</b>	<b>0</b>
<b>c</b> Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	<b>1c</b>	<b>X</b>

Part V Statements Regarding Other IRS Filings and Tax Compliance (continued)		Yes	No
<b>2a</b>	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return	<b>2a</b>	<b>0</b>
<b>b</b>	If at least one is reported on line 2a, did the organization file all required federal employment tax returns?	<b>2b</b>	
<b>3a</b>	Did the organization have unrelated business gross income of \$1,000 or more during the year?	<b>3a</b>	<b>X</b>
<b>b</b>	If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation on Schedule O	<b>3b</b>	
<b>4a</b>	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	<b>4a</b>	<b>X</b>
<b>b</b>	If "Yes," enter the name of the foreign country See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).		
<b>5a</b>	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?	<b>5a</b>	<b>X</b>
<b>b</b>	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?	<b>5b</b>	<b>X</b>
<b>c</b>	If "Yes" to line 5a or 5b, did the organization file Form 8886-T?	<b>5c</b>	
<b>6a</b>	Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?	<b>6a</b>	<b>X</b>
<b>b</b>	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?	<b>6b</b>	
<b>7</b>	<b>Organizations that may receive deductible contributions under section 170(c).</b>		
<b>a</b>	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?	<b>7a</b>	
<b>b</b>	If "Yes," did the organization notify the donor of the value of the goods or services provided?	<b>7b</b>	
<b>c</b>	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?	<b>7c</b>	
<b>d</b>	If "Yes," indicate the number of Forms 8282 filed during the year	<b>7d</b>	
<b>e</b>	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<b>7e</b>	
<b>f</b>	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	<b>7f</b>	
<b>g</b>	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?	<b>7g</b>	
<b>h</b>	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?	<b>7h</b>	
<b>8</b>	<b>Sponsoring organizations maintaining donor advised funds.</b> Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?	<b>8</b>	
<b>9</b>	<b>Sponsoring organizations maintaining donor advised funds.</b>		
<b>a</b>	Did the sponsoring organization make any taxable distributions under section 4966?	<b>9a</b>	
<b>b</b>	Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?	<b>9b</b>	
<b>10</b>	<b>Section 501(c)(7) organizations.</b> Enter:		
<b>a</b>	Initiation fees and capital contributions included on Part VIII, line 12	<b>10a</b>	
<b>b</b>	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	<b>10b</b>	
<b>11</b>	<b>Section 501(c)(12) organizations.</b> Enter:		
<b>a</b>	Gross income from members or shareholders	<b>11a</b>	
<b>b</b>	Gross income from other sources. (Do not net amounts due or paid to other sources against amounts due or received from them.)	<b>11b</b>	
<b>12a</b>	<b>Section 4947(a)(1) non-exempt charitable trusts.</b> Is the organization filing Form 990 in lieu of Form 1041?	<b>12a</b>	
<b>b</b>	If "Yes," enter the amount of tax-exempt interest received or accrued during the year	<b>12b</b>	
<b>13</b>	<b>Section 501(c)(29) qualified nonprofit health insurance issuers.</b>		
<b>a</b>	Is the organization licensed to issue qualified health plans in more than one state? <b>Note:</b> See the instructions for additional information the organization must report on Schedule O.	<b>13a</b>	
<b>b</b>	Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans	<b>13b</b>	
<b>c</b>	Enter the amount of reserves on hand	<b>13c</b>	
<b>14a</b>	Did the organization receive any payments for indoor tanning services during the tax year?	<b>14a</b>	<b>X</b>
<b>b</b>	If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation on Schedule O	<b>14b</b>	
<b>15</b>	Is the organization subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year? If "Yes," see instructions and file Form 4720, Schedule N.	<b>15</b>	<b>X</b>
<b>16</b>	Is the organization an educational institution subject to the section 4968 excise tax on net investment income? If "Yes," complete Form 4720, Schedule O.	<b>16</b>	<b>X</b>
<b>17</b>	<b>Section 501(c)(21) organizations.</b> Did the trust, any disqualified or other person engage in any activities that would result in the imposition of an excise tax under section 4951, 4952 or 4953? If "Yes," complete Form 6069.	<b>17</b>	

**Part VI Governance, Management, and Disclosure** For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes on Schedule O. See instructions. Check if Schedule O contains a response or note to any line in this Part VI ☒

**Section A. Governing Body and Management**

	1a	11	1b	11	Yes	No
<b>1a</b> Enter the number of voting members of the governing body at the end of the tax year If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain on Schedule O.		11		11		
<b>b</b> Enter the number of voting members included on line 1a, above, who are independent			1b	11		
<b>2</b> Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?					2	X
<b>3</b> Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, trustees, or key employees to a management company or other person?					3	X
<b>4</b> Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?					4	X
<b>5</b> Did the organization become aware during the year of a significant diversion of the organization's assets?					5	X
<b>6</b> Did the organization have members or stockholders?					6	X
<b>7a</b> Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?					7a	X
<b>b</b> Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?					7b	X
<b>8</b> Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:						
<b>a</b> The governing body?					8a	X
<b>b</b> Each committee with authority to act on behalf of the governing body?					8b	X
<b>9</b> Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses on Schedule O					9	X

**Section B. Policies** (This Section B requests information about policies not required by the Internal Revenue Code.)

	Yes	No
<b>10a</b> Did the organization have local chapters, branches, or affiliates?	10a	X
<b>b</b> If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes?	10b	X
<b>11a</b> Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?	11a	X
<b>b</b> Describe on Schedule O the process, if any, used by the organization to review this Form 990.		
<b>12a</b> Did the organization have a written conflict of interest policy? If "No," go to line 13	12a	X
<b>b</b> Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	12b	X
<b>c</b> Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe on Schedule O how this was done	12c	X
<b>13</b> Did the organization have a written whistleblower policy?	13	X
<b>14</b> Did the organization have a written document retention and destruction policy?	14	X
<b>15</b> Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?		
<b>a</b> The organization's CEO, Executive Director, or top management official	15a	X
<b>b</b> Other officers or key employees of the organization	15b	X
If "Yes" to line 15a or 15b, describe the process on Schedule O. See instructions.		
<b>16a</b> Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?	16a	X
<b>b</b> If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements?	16b	

**Section C. Disclosure**

**17** List the states with which a copy of this Form 990 is required to be filed **NONE**

**18** Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A, if applicable), 990, and 990-T (section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.  
☒ Own website ☒ Another's website ☐ Upon request ☐ Other (explain on Schedule O)

**19** Describe on Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.

**20** State the name, address, and telephone number of the person who possesses the organization's books and records.

**JEFFREY WOLFF**  
**CHANTILLY**

**4410 BROOKFIELD CORPORATE DR 220469**

**VA 20153-0469 703-544-5655**

**Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**

Check if Schedule O contains a response or note to any line in this Part VII

**Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees****1a** Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
  - List all of the organization's **current** key employees, if any. See instructions for definition of "key employee."
  - List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (box 5 of Form W-2, box 6 of Form 1099-MISC, and/or box 1 of Form 1099-NEC) of more than \$100,000 from the organization and any related organizations.
  - List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
  - List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.
- See the instructions for the order in which to list the persons above.

☐ Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

(A) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) <b>ERIC LAMB</b>										
GOVERNOR	5.00 0.00	X		X				0	0	0
(2) <b>JOSHUA HISCOCK</b>										
GOVERNOR-ELECT	2.00 0.00	X		X				0	0	0
(3) <b>JEFFREY WOLFF</b>										
EXECUTIVE DIRECTOR	20.00 0.00			X				40,800	0	0
(4) <b>JEN WOLFF</b>										
IMMED. PAST GOVERNOR	2.00 0.00	X		X				6,000	0	0
(5) <b>TIMOTHY GILLETTE</b>										
VICE GOVERNOR	2.00 0.00	X		X				0	0	0
(6) <b>JAMIE MOORE</b>										
TRUSTEE	2.00 0.00	X						0	0	0
(7) <b>ROGER DIEHL</b>										
TRUSTEE	2.00 0.00	X						0	0	0
(8) <b>CHARLES MARKS</b>										
TRUSTEE	2.00 0.00	X						0	0	0
(9) <b>RICHARD PIPPIN</b>										
TRUSTEE	2.00 0.00	X						0	0	0
(10) <b>ROBERT LEWIT</b>										
TRUSTEE	2.00 0.00	X						0	0	0
(11) <b>MARIE BOWE-QUICK</b>										
TRUSTEE	2.00 0.00	X						0	0	0

**Part VII** Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)

(A) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/ 1099-MISC/ 1099-NEC)	(E) Reportable compensation from related organizations (W-2/ 1099-MISC/ 1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(12) <b>NATHANIEL KYLE</b>										
(12) <b>TRUSTEE</b>	<b>2.00</b> <b>0.00</b>	<b>X</b>						<b>0</b>	<b>0</b>	<b>0</b>
(13)										
(14)										
(15)										
(16)										
(17)										
(18)										
(19)										
<b>1b Subtotal</b>								<b>46,800</b>		
<b>c Total from continuation sheets to Part VII, Section A</b>										
<b>d Total (add lines 1b and 1c)</b>								<b>46,800</b>		

**2** Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization **0**

- 3** Did the organization list any **former** officer, director, trustee, key employee, or highest compensated employee on line 1a? If "Yes," complete Schedule J for such individual
- 4** For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? If "Yes," complete Schedule J for such individual
- 5** Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? If "Yes," complete Schedule J for such person

	Yes	No
<b>3</b>		<b>X</b>
<b>4</b>		<b>X</b>
<b>5</b>		<b>X</b>

**Section B. Independent Contractors**

**1** Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization's tax year.

(A) Name and business address	(B) Description of services	(C) Compensation

**2** Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization

0

**Part VIII Statement of Revenue**Check if Schedule O contains a response or note to any line in this Part VIII ☐

				(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512-514	
<b>Contributions, Gifts, Grants and Other Similar Amounts</b>	<b>1a</b> Federated campaigns	<b>1a</b>						
	<b>b</b> Membership dues	<b>1b</b>	176,990					
	<b>c</b> Fundraising events	<b>1c</b>						
	<b>d</b> Related organizations	<b>1d</b>						
	<b>e</b> Government grants (contributions)	<b>1e</b>						
	<b>f</b> All other contributions, gifts, grants, and similar amounts not included above	<b>1f</b>	12,549					
	<b>g</b> Noncash contributions included in lines 1a-1f	<b>1g</b>	\$					
	<b>h</b> Total. Add lines 1a-1f		189,539					
	<b>Program Service Revenue</b>							Business Code
<b>2a</b> CONFERENCES AND EVENTS				217,986	217,986			
<b>b</b>								
<b>c</b>								
<b>d</b>								
<b>e</b>								
<b>f</b> All other program service revenue								
<b>g</b> Total. Add lines 2a-2f			217,986					
<b>Other Revenue</b>	<b>3</b> Investment income (including dividends, interest, and other similar amounts)			25,341			25,341	
	<b>4</b> Income from investment of tax-exempt bond proceeds							
	<b>5</b> Royalties							
	<b>6a</b> Gross rents		(i) Real	(ii) Personal				
		<b>6a</b>						
		<b>b</b> Less: rental expenses	<b>6b</b>					
	<b>c</b> Rental inc. or (loss)	<b>6c</b>						
	<b>d</b> Net rental income or (loss)							
	<b>7a</b> Gross amount from sales of assets other than inventory		(i) Securities	(ii) Other				
		<b>7a</b>	261,381					
		<b>b</b> Less: cost or other basis and sales exps.	<b>7b</b>	260,539				
	<b>c</b> Gain or (loss)	<b>7c</b>	842					
	<b>d</b> Net gain or (loss)			842	842			
	<b>8a</b> Gross income from fundraising events (not including \$ of contributions reported on line 1c). See Part IV, line 18							
		<b>8a</b>						
	<b>b</b> Less: direct expenses	<b>8b</b>						
	<b>c</b> Net income or (loss) from fundraising events							
	<b>9a</b> Gross income from gaming activities. See Part IV, line 19							
		<b>9a</b>						
<b>b</b> Less: direct expenses	<b>9b</b>							
<b>c</b> Net income or (loss) from gaming activities								
<b>10a</b> Gross sales of inventory, less returns and allowances								
	<b>10a</b>							
<b>b</b> Less: cost of goods sold	<b>10b</b>							
<b>c</b> Net income or (loss) from sales of inventory								
<b>Miscellaneous Revenue</b>			Business Code					
	<b>11a</b> OTHER INCOME			11,638			11,638	
	<b>b</b>							
	<b>c</b>							
	<b>d</b> All other revenue							
	<b>e</b> Total. Add lines 11a-11d		11,638					
<b>12</b> Total revenue. See instructions			445,346	218,828	0	36,979		



**Part IX Statement of Functional Expenses**

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX ☐

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.

	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
<b>1</b> Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21				
<b>2</b> Grants and other assistance to domestic individuals. See Part IV, line 22				
<b>3</b> Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16				
<b>4</b> Benefits paid to or for members				
<b>5</b> Compensation of current officers, directors, trustees, and key employees	<b>46,800</b>	<b>26,400</b>	<b>20,400</b>	
<b>6</b> Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
<b>7</b> Other salaries and wages				
<b>8</b> Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)				
<b>9</b> Other employee benefits				
<b>10</b> Payroll taxes				
<b>11</b> Fees for services (nonemployees):				
<b>a</b> Management	<b>6,000</b>	<b>6,000</b>		
<b>b</b> Legal				
<b>c</b> Accounting	<b>5,500</b>		<b>5,500</b>	
<b>d</b> Lobbying				
<b>e</b> Professional fundraising services. See Part IV, line 17				
<b>f</b> Investment management fees	<b>9,404</b>		<b>9,404</b>	
<b>g</b> Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O.)				
<b>12</b> Advertising and promotion				
<b>13</b> Office expenses	<b>6,934</b>		<b>6,934</b>	
<b>14</b> Information technology				
<b>15</b> Royalties				
<b>16</b> Occupancy				
<b>17</b> Travel	<b>275,490</b>	<b>275,490</b>		
<b>18</b> Payments of travel or entertainment expenses for any federal, state, or local public officials				
<b>19</b> Conferences, conventions, and meetings	<b>55,317</b>	<b>55,317</b>		
<b>20</b> Interest				
<b>21</b> Payments to affiliates				
<b>22</b> Depreciation, depletion, and amortization				
<b>23</b> Insurance	<b>800</b>		<b>800</b>	
<b>24</b> Other expenses. Itemize expenses not covered above. (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
<b>a</b> <b>SERVICES LEADERSHIP PROG</b>	<b>15,505</b>	<b>15,505</b>		
<b>b</b> <b>AWARDS/CERTIFICATES</b>	<b>14,168</b>	<b>14,168</b>		
<b>c</b> <b>TELEPHONE/INTERNET</b>	<b>1,200</b>		<b>1,200</b>	
<b>d</b> <b>PROFESSIONAL SERVICES</b>	<b>49</b>		<b>49</b>	
<b>e</b> All other expenses				
<b>25</b> Total functional expenses. Add lines 1 through 24e	<b>437,167</b>	<b>392,880</b>	<b>44,287</b>	<b>0</b>
<b>26</b> Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720)				

**Part X Balance Sheet**Check if Schedule O contains a response or note to any line in this Part X ☐

		(A) Beginning of year		(B) End of year
<b>Assets</b>	<b>1</b> Cash—non-interest-bearing .....		<b>1</b>	
	<b>2</b> Savings and temporary cash investments .....	<b>132,290</b>	<b>2</b>	<b>132,510</b>
	<b>3</b> Pledges and grants receivable, net .....		<b>3</b>	
	<b>4</b> Accounts receivable, net .....		<b>4</b>	
	<b>5</b> Loans and other receivables from any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons .....		<b>5</b>	
	<b>6</b> Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B) .....		<b>6</b>	
	<b>7</b> Notes and loans receivable, net .....		<b>7</b>	
	<b>8</b> Inventories for sale or use .....		<b>8</b>	
	<b>9</b> Prepaid expenses and deferred charges .....		<b>9</b>	
	<b>10a</b> Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D .....	<b>10a</b>		
	<b>b</b> Less: accumulated depreciation .....	<b>10b</b>	<b>10c</b>	
	<b>11</b> Investments—publicly traded securities .....	<b>886,989</b>	<b>11</b>	<b>1,063,135</b>
	<b>12</b> Investments—other securities. See Part IV, line 11 .....		<b>12</b>	
	<b>13</b> Investments—program-related. See Part IV, line 11 .....		<b>13</b>	
	<b>14</b> Intangible assets .....		<b>14</b>	
	<b>15</b> Other assets. See Part IV, line 11 .....		<b>15</b>	
<b>16 Total assets.</b> Add lines 1 through 15 (must equal line 33) .....	<b>1,019,279</b>	<b>16</b>	<b>1,195,645</b>	
<b>Liabilities</b>	<b>17</b> Accounts payable and accrued expenses .....	<b>2,000</b>	<b>17</b>	<b>1,152</b>
	<b>18</b> Grants payable .....		<b>18</b>	
	<b>19</b> Deferred revenue .....		<b>19</b>	
	<b>20</b> Tax-exempt bond liabilities .....		<b>20</b>	
	<b>21</b> Escrow or custodial account liability. Complete Part IV of Schedule D .....		<b>21</b>	
	<b>22</b> Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons .....		<b>22</b>	
	<b>23</b> Secured mortgages and notes payable to unrelated third parties .....		<b>23</b>	
	<b>24</b> Unsecured notes and loans payable to unrelated third parties .....		<b>24</b>	
	<b>25</b> Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D .....		<b>25</b>	
	<b>26 Total liabilities.</b> Add lines 17 through 25 .....	<b>2,000</b>	<b>26</b>	<b>1,152</b>
<b>Net Assets or Fund Balances</b>	<b>Organizations that follow FASB ASC 958, check here</b> <input checked="" type="checkbox"/> <b>and complete lines 27, 28, 32, and 33.</b>			
	<b>27</b> Net assets without donor restrictions .....	<b>1,017,279</b>	<b>27</b>	<b>1,194,493</b>
	<b>28</b> Net assets with donor restrictions .....		<b>28</b>	
	<b>Organizations that do not follow FASB ASC 958, check here</b> <input type="checkbox"/> <b>and complete lines 29 through 33.</b>			
	<b>29</b> Capital stock or trust principal, or current funds .....		<b>29</b>	
	<b>30</b> Paid-in or capital surplus, or land, building, or equipment fund .....		<b>30</b>	
	<b>31</b> Retained earnings, endowment, accumulated income, or other funds .....		<b>31</b>	
	<b>32 Total net assets or fund balances</b> .....	<b>1,017,279</b>	<b>32</b>	<b>1,194,493</b>
	<b>33 Total liabilities and net assets/fund balances</b> .....	<b>1,019,279</b>	<b>33</b>	<b>1,195,645</b>

**Part XI Reconciliation of Net Assets**Check if Schedule O contains a response or note to any line in this Part XI ☐

<b>1</b>	Total revenue (must equal Part VIII, column (A), line 12)	<b>1</b>	<b>445,346</b>
<b>2</b>	Total expenses (must equal Part IX, column (A), line 25)	<b>2</b>	<b>437,167</b>
<b>3</b>	Revenue less expenses. Subtract line 2 from line 1	<b>3</b>	<b>8,179</b>
<b>4</b>	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	<b>4</b>	<b>1,017,279</b>
<b>5</b>	Net unrealized gains (losses) on investments	<b>5</b>	<b>169,035</b>
<b>6</b>	Donated services and use of facilities	<b>6</b>	
<b>7</b>	Investment expenses	<b>7</b>	
<b>8</b>	Prior period adjustments	<b>8</b>	
<b>9</b>	Other changes in net assets or fund balances (explain on Schedule O)	<b>9</b>	
<b>10</b>	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B))	<b>10</b>	<b>1,194,493</b>

**Part XII Financial Statements and Reporting**Check if Schedule O contains a response or note to any line in this Part XII ☐

	Yes	No
<b>1</b> Accounting method used to prepare the Form 990: <input type="checkbox"/> Cash <input type="checkbox"/> Accrual <input checked="" type="checkbox"/> Other <b>MODIFIED CASH</b> If the organization changed its method of accounting from a prior year or checked "Other," explain on Schedule O.		
<b>2a</b> Were the organization's financial statements compiled or reviewed by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both. <input checked="" type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis	<b>X</b>	
<b>b</b> Were the organization's financial statements audited by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both. <input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis		<b>X</b>
<b>c</b> If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? If the organization changed either its oversight process or selection process during the tax year, explain on Schedule O.	<b>X</b>	
<b>3a</b> As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Uniform Guidance, 2 C.F.R. Part 200, Subpart F?		<b>X</b>
<b>b</b> If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why on Schedule O and describe any steps taken to undergo such audits		

**SCHEDULE C**  
**(Form 990)****Political Campaign and Lobbying Activities**

OMB No. 1545-0047

**2023****Open to Public  
Inspection**Department of the Treasury  
Internal Revenue Service**For Organizations Exempt From Income Tax Under Section 501(c) and Section 527****Complete if the organization is described below. Attach to Form 990 or Form 990-EZ.****Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.****If the organization answered "Yes" on Form 990, Part IV, line 3, or Form 990-EZ, Part V, line 46 (Political Campaign Activities), then:**

- Section 501(c)(3) organizations: Complete Parts I-A and B. Do not complete Part I-C.
- Section 501(c) (other than section 501(c)(3)) organizations: Complete Parts I-A and C below. Do not complete Part I-B.
- Section 527 organizations: Complete Part I-A only.

**If the organization answered "Yes" on Form 990, Part IV, line 4, or Form 990-EZ, Part VI, line 47 (Lobbying Activities), then:**

- Section 501(c)(3) organizations that have filed Form 5768 (election under section 501(h)): Complete Part II-A. Do not complete Part II-B.
- Section 501(c)(3) organizations that have NOT filed Form 5768 (election under section 501(h)): Complete Part II-B. Do not complete Part II-A.

**If the organization answered "Yes" on Form 990, Part IV, line 5 (Proxy Tax) (see separate instructions) or Form 990-EZ, Part V, line 35c (Proxy Tax) (see separate instructions), then:**

- Section 501(c)(4), (5), or (6) organizations: Complete Part III.

Name of organization **CAPITAL DISTRICT OF KIWANIS  
INTERNATIONAL, INC.**Employer identification number  
**54-0160298****Part I-A Complete if the organization is exempt under section 501(c) or is a section 527 organization.****1** Provide a description of the organization's direct and indirect political campaign activities in Part IV. See instructions for definition of "political campaign activities."**2** Political campaign activity expenditures. See instructions \$**3** Volunteer hours for political campaign activities. See instructions**Part I-B Complete if the organization is exempt under section 501(c)(3).****1** Enter the amount of any excise tax incurred by the organization under section 4955 \$**2** Enter the amount of any excise tax incurred by organization managers under section 4955 \$**3** If the organization incurred a section 4955 tax, did it file Form 4720 for this year? ☐ Yes ☐ No**4a** Was a correction made? ☐ Yes ☐ No**b** If "Yes," describe in Part IV.**Part I-C Complete if the organization is exempt under section 501(c), except section 501(c)(3).****1** Enter the amount directly expended by the filing organization for section 527 exempt function activities \$**2** Enter the amount of the filing organization's funds contributed to other organizations for section 527 exempt function activities \$**3** Total exempt function expenditures. Add lines 1 and 2. Enter here and on Form 1120-POL, line 17b \$**4** Did the filing organization file **Form 1120-POL** for this year? ☐ Yes ☐ No**5** Enter the names, addresses, and employer identification number (EIN) of all section 527 political organizations to which the filing organization made payments. For each organization listed, enter the amount paid from the filing organization's funds. Also enter the amount of political contributions received that were promptly and directly delivered to a separate political organization, such as a separate segregated fund or a political action committee (PAC). If additional space is needed, provide information in Part IV.

(a) Name	(b) Address	(c) EIN	(d) Amount paid from filing organization's funds. If none, enter -0-.	(e) Amount of political contributions received and promptly and directly delivered to a separate political organization. If none, enter -0-.
(1)				
(2)				
(3)				
(4)				
(5)				
(6)				

For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Schedule C (Form 990) 2023

**Part II-A** Complete if the organization is exempt under section 501(c)(3) and filed Form 5768 (election under section 501(h)).

- A** Check ☐ if the filing organization belongs to an affiliated group (and list in Part IV each affiliated group member's name, address, EIN, expenses, and share of excess lobbying expenditures).
- B** Check ☐ if the filing organization checked box A and "limited control" provisions apply.

Limits on Lobbying Expenditures (The term "expenditures" means amounts paid or incurred.)		(a) Filing organization's totals	(b) Affiliated group totals												
<b>1a</b> Total lobbying expenditures to influence public opinion (grassroots lobbying)															
<b>b</b> Total lobbying expenditures to influence a legislative body (direct lobbying)															
<b>c</b> Total lobbying expenditures (add lines 1a and 1b)															
<b>d</b> Other exempt purpose expenditures															
<b>e</b> Total exempt purpose expenditures (add lines 1c and 1d)															
<b>f</b> Lobbying nontaxable amount. Enter the amount from the following table in both columns.															
<table border="1"> <thead> <tr> <th>If the amount on line 1e, column (a) or (b) is:</th> <th>The lobbying nontaxable amount is:</th> </tr> </thead> <tbody> <tr> <td>not over \$500,000,</td> <td>20% of the amount on line 1e.</td> </tr> <tr> <td>over \$500,000 but not over \$1,000,000,</td> <td>\$100,000 plus 15% of the excess over \$500,000.</td> </tr> <tr> <td>over \$1,000,000 but not over \$1,500,000,</td> <td>\$175,000 plus 10% of the excess over \$1,000,000.</td> </tr> <tr> <td>over \$1,500,000 but not over \$17,000,000,</td> <td>\$225,000 plus 5% of the excess over \$1,500,000.</td> </tr> <tr> <td>over \$17,000,000,</td> <td>\$1,000,000.</td> </tr> </tbody> </table>	If the amount on line 1e, column (a) or (b) is:	The lobbying nontaxable amount is:	not over \$500,000,	20% of the amount on line 1e.	over \$500,000 but not over \$1,000,000,	\$100,000 plus 15% of the excess over \$500,000.	over \$1,000,000 but not over \$1,500,000,	\$175,000 plus 10% of the excess over \$1,000,000.	over \$1,500,000 but not over \$17,000,000,	\$225,000 plus 5% of the excess over \$1,500,000.	over \$17,000,000,	\$1,000,000.			
If the amount on line 1e, column (a) or (b) is:	The lobbying nontaxable amount is:														
not over \$500,000,	20% of the amount on line 1e.														
over \$500,000 but not over \$1,000,000,	\$100,000 plus 15% of the excess over \$500,000.														
over \$1,000,000 but not over \$1,500,000,	\$175,000 plus 10% of the excess over \$1,000,000.														
over \$1,500,000 but not over \$17,000,000,	\$225,000 plus 5% of the excess over \$1,500,000.														
over \$17,000,000,	\$1,000,000.														
<b>g</b> Grassroots nontaxable amount (enter 25% of line 1f)															
<b>h</b> Subtract line 1g from line 1a. If zero or less, enter -0-															
<b>i</b> Subtract line 1f from line 1c. If zero or less, enter -0-															
<b>j</b> If there is an amount other than zero on either line 1h or line 1i, did the organization file Form 4720 reporting section 4911 tax for this year?			<input type="checkbox"/> Yes <input type="checkbox"/> No												

**4-Year Averaging Period Under Section 501(h)**

(Some organizations that made a section 501(h) election do not have to complete all of the five columns below.  
See the separate instructions for lines 2a through 2f.)

Lobbying Expenditures During 4-Year Averaging Period					
Calendar year (or fiscal year beginning in)	(a) 2020	(b) 2021	(c) 2022	(d) 2023	(e) Total
<b>2a</b> Lobbying nontaxable amount					
<b>b</b> Lobbying ceiling amount (150% of line 2a, column (e))					
<b>c</b> Total lobbying expenditures					
<b>d</b> Grassroots nontaxable amount					
<b>e</b> Grassroots ceiling amount (150% of line 2d, column (e))					
<b>f</b> Grassroots lobbying expenditures					

**Part II-B Complete if the organization is exempt under section 501(c)(3) and has NOT filed Form 5768 (election under section 501(h)).**

For each "Yes" response on lines 1a through 1i below, provide in Part IV a detailed description of the lobbying activity.

	(a)		(b)
	Yes	No	Amount
<b>1</b> During the year, did the filing organization attempt to influence foreign, national, state, or local legislation, including any attempt to influence public opinion on a legislative matter or referendum, through the use of:			
<b>a</b> Volunteers?			
<b>b</b> Paid staff or management (include compensation in expenses reported on lines 1c through 1i)?			
<b>c</b> Media advertisements?			
<b>d</b> Mailings to members, legislators, or the public?			
<b>e</b> Publications, or published or broadcast statements?			
<b>f</b> Grants to other organizations for lobbying purposes?			
<b>g</b> Direct contact with legislators, their staffs, government officials, or a legislative body?			
<b>h</b> Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means?			
<b>i</b> Other activities?			
<b>j</b> Total. Add lines 1c through 1i			
<b>2a</b> Did the activities in line 1 cause the organization to not be described in section 501(c)(3)?			
<b>b</b> If "Yes," enter the amount of any tax incurred under section 4912			
<b>c</b> If "Yes," enter the amount of any tax incurred by organization managers under section 4912			
<b>d</b> If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year?			

**Part III-A Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6).**

	Yes	No
<b>1</b> Were substantially all (90% or more) dues received nondeductible by members?	<b>1</b>	<b>X</b>
<b>2</b> Did the organization make only in-house lobbying expenditures of \$2,000 or less?	<b>2</b>	<b>X</b>
<b>3</b> Did the organization agree to carry over lobbying and political campaign activity expenditures from the prior year?	<b>3</b>	<b>X</b>

**Part III-B Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6) and if either (a) BOTH Part III-A, lines 1 and 2, are answered "No" OR (b) Part III-A, line 3, is answered "Yes."**

<b>1</b> Dues, assessments and similar amounts from members	<b>1</b>	
<b>2</b> Section 162(e) nondeductible lobbying and political expenditures (do not include amounts of political expenses for which the section 527(f) tax was paid).		
<b>a</b> Current year	<b>2a</b>	
<b>b</b> Carryover from last year	<b>2b</b>	
<b>c</b> Total	<b>2c</b>	
<b>3</b> Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues	<b>3</b>	
<b>4</b> If notices were sent and the amount on line 2c exceeds the amount on line 3, what portion of the excess does the organization agree to carryover to the reasonable estimate of nondeductible lobbying and political expenditures next year?	<b>4</b>	
<b>5</b> Taxable amount of lobbying and political expenditures. See instructions	<b>5</b>	

**Part IV Supplemental Information**

Provide the descriptions required for Part I-A, line 1; Part I-B, line 4; Part I-C, line 5; Part II-A (affiliated group list); Part II-A, lines 1 and 2 (see instructions); and Part II-B, line 1. Also, complete this part for any additional information.

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Part IV	Supplemental Information (continued)
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Schedule C (Form 990) 2023





Name of the organization	Employer identification number
CAPITAL DISTRICT OF KIWANIS	54-0160298

PRIOR TO ASSUMING OFFICE OR COMMITTEE MEMBERSHIP, EACH INDIVIDUAL MUST SIGN A STATEMENT THAT AFFIRMS HE/SHE UNDERSTANDS AND COMPLIES WITH THE DISTRICT POLICY ON CONFLICT OF INTEREST.

FORM 990, PART VI, LINE 15A - COMPENSATION PROCESS FOR TOP OFFICIAL COMPENSATION AMOUNTS REQUIRE APPROVAL BY THE BOARD OF TRUSTEES.

FORM 990, PART VI, LINE 19 - GOVERNING DOCUMENTS DISCLOSURE EXPLANATION GOVERNING DOCUMENTS OF THE ORGANIZATION ARE AVAILABLE UPON REQUEST FROM THE TREASURER.

FORM 990, PART VII - ADDITIONAL INFORMATION  
CAPITAL DISTRICT KIWANIS, CAPITAL DISTRICT KEY CLUB, AND CAPITAL DISTRICT CIRCLE K EACH HAVE SEPARATE GOVERNING BODIES THAT OVERSEE THE OPERATIONS OF THE PROGRAMS. DUE TO PRIVACY CONCERNS OVER STUDENTS AND MINORS THAT MAKE UP THE BOARDS OF THE KEY CLUB AND CIRCLE K, CAPITAL DISTRICT KIWANIS HAS ELECTED TO NOT DISCLOSE THE NAMES OF THE BOARD MEMBERS OF THOSE PROGRAMS ON FORM 990, PART VII.

Form <b>990</b>	<b>Two Year Comparison Report</b>			<b>2022 &amp; 2023</b>
For calendar year 2023, or tax year beginning <b>10/01/23</b> , ending <b>09/30/24</b>				
Name <b>CAPITAL DISTRICT OF KIWANIS INTERNATIONAL, INC.</b>				Taxpayer Identification Number <b>54-0160298</b>

  

			2022	2023	Differences
<b>Revenue</b>	1. Contributions, gifts, grants .....	1.	7,646	12,549	4,903
	2. Membership dues and assessments .....	2.	179,300	176,990	-2,310
	3. Government contributions and grants .....	3.			
	4. Program service revenue .....	4.	190,073	217,986	27,913
	5. Investment income .....	5.	23,313	25,341	2,028
	6. Proceeds from tax exempt bonds .....	6.			
	7. Net gain or (loss) from sale of assets other than inventory .....	7.	-31,667	842	32,509
	8. Net income or (loss) from fundraising events .....	8.			
	9. Net income or (loss) from gaming .....	9.			
	10. Net gain or (loss) on sales of inventory .....	10.			
	11. Other revenue .....	11.		11,638	11,638
	12. <b>Total revenue.</b> Add lines 1 through 11	12.	368,665	445,346	76,681
<b>Expenses</b>	13. Grants and similar amounts paid .....	13.	55,238		-55,238
	14. Benefits paid to or for members .....	14.			
	15. Compensation of officers, directors, trustees, etc. ....	15.	46,800	46,800	
	16. Salaries, other compensation, and employee benefits .....	16.			
	17. Professional fundraising fees .....	17.			
	18. Other professional fees .....	18.	20,169	20,904	735
	19. Occupancy, rent, utilities, and maintenance .....	19.			
	20. Depreciation and Depletion .....	20.			
	21. Other expenses .....	21.	338,511	369,463	30,952
	22. <b>Total expenses.</b> Add lines 13 through 21	22.	460,718	437,167	-23,551
	23. <b>Excess or (Deficit).</b> Subtract line 22 from line 12	23.	-92,053	8,179	100,232
<b>Other Information</b>	24. Total exempt revenue .....	24.	368,665	445,346	76,681
	25. Total unrelated revenue .....	25.			
	26. Total excludable revenue .....	26.	181,719	255,807	74,088
	27. Total assets .....	27.	1,019,279	1,195,645	176,366
	28. Total liabilities .....	28.	2,000	1,152	-848
	29. Retained earnings .....	29.	1,017,279	1,194,493	177,214
	30. Number of voting members of governing body .....	30.	10	11	
	31. Number of independent voting members of governing body .....	31.	10	11	
32. Number of employees .....	32.	1	0		
33. Number of volunteers .....	33.	200	200		

Form <b>990</b>	<b>Tax Return History</b>	<b>2023</b>
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Name <b>CAPITAL DISTRICT OF KIWANIS INTERNATIONAL, INC.</b>	Employer Identification Number <b>54-0160298</b>
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	2019	2020	2021	2022	2023	2024
Contributions, gifts, grants .....		4,088	17,555	7,646	12,549	
Membership dues .....	129,370	151,855	182,033	179,300	176,990	
Program service revenue .....	16,429	29,519	150,382	190,073	217,986	
Capital gain or loss .....	16,725	11,459	113,547	-31,667	842	
Investment income .....	10,612	13,226	21,919	23,313	25,341	
Fundraising revenue (income/loss) .....						
Gaming revenue (income/loss) .....						
Other revenue .....			97,428		11,638	
<b>Total revenue</b> .....	<b>173,136</b>	<b>210,147</b>	<b>582,864</b>	<b>368,665</b>	<b>445,346</b>	
Grants and similar amounts paid .....	11,000	29,642	43,576	55,238		
Benefits paid to or for members .....						
Compensation of officers, etc. ....	30,000	36,000	50,400	46,800	46,800	
Other compensation .....		3,574	1,853			
Professional fees .....	750	5,000	14,232	20,169	20,904	
Occupancy costs .....						
Depreciation and depletion .....						
Other expenses .....	73,469	101,406	287,987	338,511	369,463	
<b>Total expenses</b> .....	<b>115,219</b>	<b>175,622</b>	<b>398,048</b>	<b>460,718</b>	<b>437,167</b>	
<b>Excess or (Deficit)</b> .....	<b>57,917</b>	<b>34,525</b>	<b>184,816</b>	<b>-92,053</b>	<b>8,179</b>	
Total exempt revenue .....	173,136	210,147	582,864	368,665	445,346	
Total unrelated revenue .....						
Total excludable revenue .....	43,766	54,204	383,276	181,719	255,807	
Total Assets .....	783,931	1,142,283	1,000,695	1,019,279	1,195,645	
Total Liabilities .....	3,343	5,654	2,066	2,000	1,152	
Net Fund Balances .....	780,588	1,136,629	998,629	1,017,279	1,194,493	

**Taxable Interest on Investments**

Description	Amount	Unrelated Business	Exclusion Code	Postal Code	Acquired after 6/30/75	US Obs (\$ or %)
	\$ 8,023		14			
TOTAL	\$ 8,023					

**Taxable Dividends from Securities**

Description	Amount	Unrelated Business	Exclusion Code	Postal Code	Acquired after 6/30/75	US Obs (\$ or %)
	\$ 17,318		14			
TOTAL	\$ 17,318					



July 17, 2025

Didawick & Company, P.C.  
Certified Public Accountants  
P. O. Box 2976  
Staunton, VA 24402

We are providing this letter in connection with your review of the financial statements of Capital District of Kiwanis International, Inc. (the Organization), which comprise the statement of assets, liabilities, and net assets – modified cash basis as of September 30, 2024, and the related statements of revenues, expenses, and other changes in net assets – modified cash basis; functional expenses – modified cash basis; and cash flows – modified cash basis for the year then ended, and the related notes to the financial statements, for the purpose of obtaining limited assurance as a basis for reporting whether you are aware of any material modifications that should be made to the financial statements in order for them to be in accordance with the modified cash basis.

Certain representations in this letter are described as being limited to matters that are material. Items are considered material, regardless of size, if they involve an omission or misstatement of accounting information that, in light of surrounding circumstances, makes it probable that the judgment of a reasonable person relying on the information would be changed or influenced by the omission or misstatement.

We confirm, to the best of our knowledge and belief, as of July 17, 2025, that we have fulfilled our responsibilities including the following representations made to you during your review.

#### **Financial Statements**

- 1) We have fulfilled our responsibility for the preparation and fair presentation of the financial statements in accordance with the modified cash basis of accounting, as set out in the terms of the review engagement letter dated March 6, 2025.
- 2) We have made available to you all:
  - a. Financial records and related data.
  - b. Minutes of the meetings of trustees, board of directors, and committees of directors (or similar bodies, as applicable), or summaries of actions of recent meetings for which minutes have not yet been prepared.
  - c. Additional information you have requested from us for the purpose of the review.
  - d. Unrestricted access to organization personnel from whom you determined it necessary to obtain review evidence.
- 3) There have been no communications from regulatory agencies concerning noncompliance with, or deficiencies in, financial reporting practices.
- 4) All material transactions have been recorded and have been properly reflected in the financial statements.
- 5) There are no uncorrected misstatements.

- 6) We acknowledge and have fulfilled our responsibility for designing, implementing, and maintaining internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.
- 7) We acknowledge our responsibility for designing, implementing, and maintaining internal control to prevent and detect fraud.
- 8) We have no knowledge of any fraud or suspected fraud affecting the organization involving management, employees who have significant roles in internal control, or others where the fraud could have a material effect on the financial statements.
- 9) We have no knowledge of any allegations of fraud, or suspected fraud, affecting the organization's financial statements as a whole communicated by employees, former employees, analysts, regulators, or others.
- 10) We have disclosed to you the identity of the organization's related parties and all related-party relationships and transactions of which we are aware.
- 11) We have no plans or intentions that may materially affect the carrying value or classification of assets, liabilities, or net asset balances.
- 12) The following have been properly recorded or disclosed in the financial statements:
  - a. Related party transactions including sales, purchases, loans, transfers, leasing arrangements, and guarantees, and amounts receivable from or payable to related parties.
  - b. Guarantees, whether written or oral, under which the organization is contingently liable.
  - c. Significant estimates and material concentrations known to management that are required to be disclosed in accordance with *FASB ASC 275, Risks and Uncertainties*.
- 13) There are no:
  - a. Known or suspected instances of noncompliance with laws or regulations whose effects should be considered for disclosure in the financial statements or as a basis for recording a loss contingency.
  - b. Actual or possible claims or assessments that our lawyer has advised us are probable of assertion and must be disclosed in accordance with [FASB ASC 450, Contingencies](#).
  - c. Other material liabilities or gain or loss contingencies that are required to be accrued or disclosed by [FASB ASC 450, Contingencies](#).
- 14) The Organization has satisfactory title of all owned assets, and there are no liens or encumbrances on such assets nor has any asset been pledged.
- 15) There are no designations of net assets that were not properly authorized and approved or reclassifications of net assets that have not been properly reflected in the financial statements.
- 16) We have complied with all restrictions on resources (including donor restrictions) and all aspects of contractual and grant agreements that would have a material effect on the financial statements in the event of noncompliance. This includes complying with donor requirements to maintain a specific asset composition necessary to satisfy their restrictions.
- 17) We believe significant assumptions used by us in making accounting estimates, including those measured at fair value, are reasonable in the circumstances.

- 18) We are in agreement with the adjusting journal entries you have recommended, and they have been posted to the entity's accounts.
- 19) We have disclosed to you all information relevant to the use of the going concern assumption in the financial statements.
- 20) No events have occurred subsequent to the date of the financial statements and through the date of this letter that would be required to be adjusted or disclosed in accordance with accounting principles generally accepted in the United States of America.
- 21) We have responded fully and truthfully to all inquiries made to us by you during your review.
- 22) In regard to the financial statement preparation services performed by you, we have—
- Assumed all management responsibilities.
  - Overseen the services by designating an individual who possesses suitable skill, knowledge, and/or experience.
  - Evaluated the adequacy and results of the services performed.
  - Accepted responsibility for the results of the services.
- 23) The organization's books and records are complete.



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Jeffrey M. Wolff  
Executive Director



# Kiwanis®

## CAPITAL DISTRICT

Report of the Executive Director  
Capital District, Kiwanis International  
August 22, 2025

### **Membership**

2024-2025 Starting # **3875**

Current Total **3950** (as 8/6/25)

Total Charters – **155**

Net Change **+75**

**Charters Pending Revocation:** Salisbury (7)

**Charters Surrendering:** St. Paul-Castlewood (0), Far East Washington (6), Short Pump (1)

**Clubs in Formation:** Laurel - MD, Easton - MD, Bel Air - MD, East End - VA

**New Clubs Chartered:** Marshall County, WV (20), North Stafford, VA (15 - waiting on org meeting)

**Large Drops** - Colonial Capital (-15), Rockbridge (-10), Smithfield (-9), Gloucester (-8), Shepherd Park (-4), Central Chesterfield (-4), Martinsville (-4)

**Single Digit Membership** - Radford (4), Hinton (5), Parsons (5), Great Bridge (5), Greater Nitro (6), Gloucester (7), Mathews (7), Mercer County (7), Central Chesterfield (8), Ocean View Beach, Norfolk (8), Georgetown (9), NW Washington (9), Montgomery Village (9), Delmar (9), Bluefield (9), Clinchco (9)

Clubs who lost members so far this year: **40 of 155 (26%)**

Clubs who gained this year: **63 of 155 (41%)**

Clubs who are net 0 so far this year: **52 of 155 (33%)**

Clubs at or above charter strength (15): **102 of 155 (66%)**

Clubs below charter strength (15): **53 of 155 (34%)**

### **Lt. Governor Election Reporting**

2025-26 Lt. Governors-Designate Elected: **17 of 18** (Missing D17)

2025-26 Lt. Governors-Elect Elected: **7 of 18**

### **2024-25 Lt. Governor Reports**

Contact: 18 out of 18 filed

Board: 18 out of 18 filed (D4 & D6 Late)

Progress: 16 out of 18 filed (D4 & D16 Missing / D6 & D20 Late)



## **Clubs who have not filed a Monthly Report in Kiwanis Engage (as of 8/6/25)**

### **Division 1:**

Far East Washington  
Northwest Washington  
Waldorf  
Washington

### **Division 2:**

Fairfax  
Fredericksburg  
Leesburg  
Manassas  
Mount Vernon, Fairfax Co  
Tysons

### **Division 3:**

Greater Landover  
Leisure World  
Montgomery Village  
Prince George's County  
Rockville

### **Division 4:**

Capital Next Gen eClub  
Commodore Mayo  
Crofton  
Ellicott City  
Frederick

### **Division 5:**

Chincoteague  
Coastal Delaware  
Delmar  
Greater Ocean Pines  
Pocomoke City  
Salisbury  
Seaford

### **Division 6:**

Elkton  
Hampden-Midtown  
Loch Raven  
Reisterstown  
Towson-Timonim

### **Division 8:**

Blue Ridge  
Hagerstown  
Old Town  
Strasburg

### **Division 9:**

Charlottesville  
Greenbriar Valley  
Harrisonburg  
Shenandoah Valley

### **Division 10:**

Central Chesterfield  
Chester  
Dinwiddie  
Richmond  
Short Pump

### **Division 12:**

Colonial Capital  
Matthews  
Middlesex, Saluda

### **Division 13:**

Carrollton  
Grafton  
Old Point Comfort

### **Division 14:**

Chesapeake  
Churchland  
Great Bridge  
North Suffolk  
Ocean View Beach  
Portsmouth

### **Division 15:**

Bassett  
Botetourt County  
Martinsville  
Salem

### **Division 16:**

Beckley  
Bluefield  
Hinton  
Montgomery County  
Radford  
War  
Welch  
Wythe County

### **Division 17:**

Clinch River  
Clintwood  
Grundy  
Hurley  
McClure River  
St. Paul-Castlewood  
Wise

### **Division 18:**

North Parkersburg  
Wellsburg  
Wheeling

### **Division 19:**

Bridgeport  
Clarksburg  
Elkins  
Fairmont  
Keyser  
Morgantown  
Parsons

### **Division 20:**

Delbarton  
East Huntington  
Gilbert  
Greater Nitro  
Logan  
St. Albans

**Clubs who have not filed 2025-26 Election Reports (due June 1, 2025)**  
(in accordance with Policy Section 2B(c))

**52 out of 155 clubs (34%) are Not in Good Standing**

**Division 1:**

Far East Washington  
Northwest Washington  
Shepherd Park  
Southwest Waterfront

**Division 2:**

Manassas  
Mount Vernon

**Division 3:**

PG County

**Division 4:**

Commodore Mayo  
Crofton

**Division 5:**

Chincoteague  
Coastal Delaware  
Delmar  
Georgetown  
Greater Ocean Pines  
Pocomoke City  
Salisbury

**Division 6:**

Hampden-Midtown  
Reisterstown  
Towson-Timonium

**Division 8:**

Blue Ridge  
Old Town

**Division 9:**

NONE

**Division 10:**

Central Chesterfield  
Colonial Heights  
Dinwiddie  
Short Pump  
Tuckahoe

**Division 12:**

Colonial Capital  
Mathews

**Division 13:**

Grafton  
Kiln Creek  
Old Point Comfort  
Smithfield

**Division 14:**

NONE

**Division 15:**

Bassett  
Martinsville  
Salem

**Division 16:**

Abingdon  
Beckley  
Bluefield  
Hinton  
Mercer County  
Radford  
War  
Welch

**Division 17:**

Grundy  
St. Paul-Castlewood

**Division 18:**

NONE

**Division 19:**

Bridgeport  
Clarksburg  
Keyser

**Division 20:**

Delbarton  
Gilbert  
Greater Nitro Area  
St, Albans



# Capital District Kiwanis

## Consolidated Statement of Activity

October 2024 - July 2025

	TOTAL
Revenue	
4300 Morgan Stanley Cash Interest	1,787.55
4301 Morgan Stanley Dividends	15,384.89
4302 Morgan Stanley Realized Gains/Losses	2,188.40
4303 Morgan Stanley Unrealized Gains/Losses	39,928.30
4304 Morgan Stanley Investment Interest	4,841.35
7000-001 Income - Membership Dues	169,093.03
7050-001 Income - New Club Dues	3,613.63
7100-001 Income - Registration & Event Fees	179,886.83
7150-001 Income - Fundraising	7,902.37
7200-002 Income - Advertising/Sponsorship	6,670.09
7400-001 Income - Grants	17,045.00
7600-001 Income - Other	17,859.56
<b>Total Revenue</b>	<b>\$466,201.00</b>
GROSS PROFIT	<b>\$466,201.00</b>
Expenditures	
8025-001 Scholarships/Awards	11,046.53
8030-001 Background Checks	35.00
8040-001 Bank Fees	160.40
8050-001 Investment Fees	8,315.52
8100-001 Committee - Achievement	437.24
8100-003 Committee - Builders Club	135.55
8100-005 Committee - Circle K International	1,913.61
8100-014 Committee - Kiwanis Kids	135.55
8100-015 Committee - Leadership & Education	648.55
8100-018 Committee - Membership	6,657.25
8100-025 Committee - Service / Signature Project	46.56
8160-001 Entertainment & A/V	15,050.61
8250-001 Insurance - D&O	800.00
8410-001 Meals	20,762.63
8420-001 Miscellaneous Expenses	505.98
8430-002 Other Charity Dontions	1,908.50
8437-001 New Club Dues Payment	2,842.30
8440-001 Office Equipment	1,751.59
8445-001 Office Supplies	847.43
8500-001 Officer Exp - Governor	3,157.75
8500-005 Officer Exp - Governor Elect	1,342.00
8500-007 Officer Exp - Vice Governor	1,150.00
8500-010 Officer Exp - Executive Director	1,409.58
8500-025 Officer Exp - Immediate Past Governor	1,299.20



# Capital District Kiwanis

## Consolidated Statement of Activity

October 2024 - July 2025

	TOTAL
8500-030 Officer Exp - Regional Trustees	9,202.56
8500-035 Officer Exp - Lt. Governors	14,580.13
8500-040 Officer Exp - Lt. Governors-Designate	11,849.60
8600-001 Pins / Badges / Shirts	4,124.67
8610-001 Postage / Shipping	39.88
8650-001 Salary - Executive Director	34,000.00
8650-002 Salary - Publication Editor	6,000.00
8650-003 Salary - Publication Designer	4,000.00
8720-001 Professional Services	108.88
8750-001 Programs & Souvenirs	5,808.77
8760-001 Conference Materials	25,860.28
8780-001 Speakers Fees	2,904.90
8810-001 Printing / Supplies	1,193.20
8830-001 Telephone / Internet	1,000.00
8850-001 District Publication Expenses	251.00
8900-050 Travel - Hotels/Lodging	161,169.37
8900-100 Travel - Airfare	1,439.84
8900-150 Travel - Automobile Expense	4,379.31
8960-001 Website / IT / Software	3,200.19
<b>Total Expenditures</b>	<b>\$373,471.91</b>
NET OPERATING REVENUE	<b>\$92,729.09</b>
Other Expenditures	
Other Miscellaneous Expenditure	6,090.00
<b>Total Other Expenditures</b>	<b>\$6,090.00</b>
NET OTHER REVENUE	<b>\$ -6,090.00</b>
NET REVENUE	<b>\$86,639.09</b>

# Capital District Kiwanis

## Budget vs. Actuals

October 2024 - September 2025

	TOTAL			
	ACTUAL	BUDGET	OVER BUDGET	REMAINING
Revenue				
4300 Morgan Stanley Cash Interest	5.78	7.00	-1.22	1.22
4301 Morgan Stanley Dividends	11,446.86	12,000.00	-553.14	553.14
4302 Morgan Stanley Realized Gains/Losses	2,188.40	-13,000.00	15,188.40	-15,188.40
4303 Morgan Stanley Unrealized Gains/Losses	32,683.14	100,000.00	-67,316.86	67,316.86
4304 Morgan Stanley Investment Interest	4,841.15	5,000.00	-158.85	158.85
7000-001 Income - Membership Dues	125,553.53	124,800.00	753.53	-753.53
7050-001 Income - New Club Dues	3,761.15	0.00	3,761.15	-3,761.15
7100-001 Income - Registration & Event Fees	53,701.20	90,000.00	-36,298.80	36,298.80
7150-001 Income - Fundraising		0.00	0.00	0.00
7200-001 Income - The Capital Kiwanian		0.00	0.00	0.00
7200-002 Income - Advertising/Sponsorship	6,638.27	5,000.00	1,638.27	-1,638.27
7300-001 Income - Kiwanis Children's Fund Donations		0.00	0.00	0.00
7400-001 Income - Grants	16,645.00	12,000.00	4,645.00	-4,645.00
7450-001 Income - CDKF Subsidy		0.00	0.00	0.00
7475-001 Income - Youth Outreach		0.00	0.00	0.00
7500-002 Income - EJ Investments		0.00	0.00	0.00
7600-001 Income - Other	5,902.56	0.00	5,902.56	-5,902.56
<b>Total Revenue</b>	<b>\$263,367.04</b>	<b>\$335,807.00</b>	<b>\$ -72,439.96</b>	<b>\$72,439.96</b>
<b>GROSS PROFIT</b>	<b>\$263,367.04</b>	<b>\$335,807.00</b>	<b>\$ -72,439.96</b>	<b>\$72,439.96</b>
Expenditures				
8025-001 Scholarships/Awards	11,000.00	11,000.00	0.00	0.00
8030-001 Background Checks	35.00	1,000.00	-965.00	965.00
8040-001 Bank Fees	160.40	0.00	160.40	-160.40
8050-001 Investment Fees	6,785.41	8,000.00	-1,214.59	1,214.59
8100-001 Committee - Achievement	437.24	1,000.00	-562.76	562.76
8100-002 Committee - Aktion Club		300.00	-300.00	300.00
8100-003 Committee - Builders Club	135.55	300.00	-164.45	164.45
8100-004 Committee - Bylaws and Policies		0.00	0.00	0.00
8100-005 Committee - Circle K International	1,913.61	2,500.00	-586.39	586.39
8100-009 Committee - Finance		250.00	-250.00	250.00
8100-010 Committee - Key Club International		1,600.00	-1,600.00	1,600.00
8100-011 Committee - Key Leader		500.00	-500.00	500.00
8100-012 Committee - Kiwanis-Family		12,000.00	-12,000.00	12,000.00
8100-014 Committee - Kiwanis Kids	135.55	300.00	-164.45	164.45
8100-015 Committee - Leadership & Education	648.55	750.00	-101.45	101.45
8100-018 Committee - Membership	6,506.21	20,000.00	-13,493.79	13,493.79
8100-020 Committee - Partnership Coordinator		300.00	-300.00	300.00
8100-023 Committee - Public Relations		500.00	-500.00	500.00
8100-025 Committee - Service / Signature Project	6,049.86	200.00	5,849.86	-5,849.86
8100-030 Committee - DEIBA		1,000.00	-1,000.00	1,000.00
8100-040 Committee - Mental Health Task Force	320.41	500.00	-179.59	179.59
8160-001 Entertainment & A/V	2,750.00	8,000.00	-5,250.00	5,250.00

# Capital District Kiwanis

## Budget vs. Actuals

October 2024 - September 2025

	TOTAL			
	ACTUAL	BUDGET	OVER BUDGET	REMAINING
8250-001 Insurance - D&O	800.00	800.00	0.00	0.00
8410-001 Meals	9,092.95	30,000.00	-20,907.05	20,907.05
8420-001 Miscellaneous Expenses	105.98	0.00	105.98	-105.98
8430-001 Kiwanis Children's Fund Donations		10,000.00	-10,000.00	10,000.00
8430-002 Other Charity Dontions		0.00	0.00	0.00
8437-001 New Club Dues Payment	2,842.30		2,842.30	-2,842.30
8440-001 Office Equipment	1,751.59		1,751.59	-1,751.59
8445-001 Office Supplies	349.55	500.00	-150.45	150.45
8500-001 Officer Exp - Governor	3,157.75	5,000.00	-1,842.25	1,842.25
8500-005 Officer Exp - Governor Elect	1,342.00	4,000.00	-2,658.00	2,658.00
8500-007 Officer Exp - Vice Governor	1,150.00	2,500.00	-1,350.00	1,350.00
8500-010 Officer Exp - Executive Director	1,409.58	3,000.00	-1,590.42	1,590.42
8500-025 Officer Exp - Immediate Past Governor	1,299.20	2,000.00	-700.80	700.80
8500-030 Officer Exp - Regional Trustees	9,202.56	8,000.00	1,202.56	-1,202.56
8500-035 Officer Exp - Lt. Governors	7,836.36	7,500.00	336.36	-336.36
8500-040 Officer Exp - Lt. Governors-Designate	11,849.60	10,000.00	1,849.60	-1,849.60
8600-001 Pins / Badges / Shirts	2,788.67	3,000.00	-211.33	211.33
8610-001 Postage / Shipping	29.78	250.00	-220.22	220.22
8650-001 Salary - Executive Director	34,000.00	40,800.00	-6,800.00	6,800.00
8650-002 Salary - Publication Editor	6,000.00	6,000.00	0.00	0.00
8650-003 Salary - Publication Designer	4,000.00	6,000.00	-2,000.00	2,000.00
8720-001 Professional Services	108.88	5,000.00	-4,891.12	4,891.12
8750-001 Programs & Souvenirs	2,852.75	1,000.00	1,852.75	-1,852.75
8760-001 Conference Materials	3,699.60	2,500.00	1,199.60	-1,199.60
8780-001 Speakers Fees	500.00	4,000.00	-3,500.00	3,500.00
8810-001 Printing / Supplies	1,193.20	200.00	993.20	-993.20
8830-001 Telephone / Internet	1,000.00	1,200.00	-200.00	200.00
8850-001 District Publication Expenses	251.00	300.00	-49.00	49.00
8900-050 Travel - Hotels/Lodging	81,910.82	50,000.00	31,910.82	-31,910.82
8900-100 Travel - Airfare		0.00	0.00	0.00
8900-150 Travel - Automobile Expense	710.00	1,100.00	-390.00	390.00
8960-001 Website / IT / Software	2,906.67	1,750.00	1,156.67	-1,156.67
<b>Total Expenditures</b>	<b>\$231,018.58</b>	<b>\$276,400.00</b>	<b>\$ -45,381.42</b>	<b>\$45,381.42</b>
<b>NET OPERATING REVENUE</b>	<b>\$32,348.46</b>	<b>\$59,407.00</b>	<b>\$ -27,058.54</b>	<b>\$27,058.54</b>
<b>NET REVENUE</b>	<b>\$32,348.46</b>	<b>\$59,407.00</b>	<b>\$ -27,058.54</b>	<b>\$27,058.54</b>



# Capital District Key Club

## Budget vs. Actuals

October 2024 - September 2025

	TOTAL			
	ACTUAL	BUDGET	OVER BUDGET	REMAINING
Revenue				
4300 Morgan Stanley Cash Interest	2.68		2.68	-2.68
4301 Morgan Stanley Dividends	3,938.03		3,938.03	-3,938.03
4303 Morgan Stanley Unrealized Gains/Losses	7,245.16		7,245.16	-7,245.16
4304 Morgan Stanley Investment Interest	0.20		0.20	-0.20
7000-001 Income - Membership Dues	41,499.50	51,750.00	-10,250.50	10,250.50
7100-001 Income - Registration & Event Fees	121,844.04	133,770.00	-11,925.96	11,925.96
7150-001 Income - Fundraising	7,902.37	1,250.00	6,652.37	-6,652.37
7200-002 Income - Advertising/Sponsorship	72.22	3,000.00	-2,927.78	2,927.78
7400-001 Income - Grants	400.00		400.00	-400.00
7600-001 Income - Other	11,957.00		11,957.00	-11,957.00
<b>Total Revenue</b>	<b>\$194,861.20</b>	<b>\$189,770.00</b>	<b>\$5,091.20</b>	<b>\$ -5,091.20</b>
GROSS PROFIT	<b>\$194,861.20</b>	<b>\$189,770.00</b>	<b>\$5,091.20</b>	<b>\$ -5,091.20</b>
Expenditures				
8010-001 Advisor Reception		1,200.00	-1,200.00	1,200.00
8020-001 Audit & Accounting & Admin Expense		0.00	0.00	0.00
8025-001 Scholarships/Awards	46.53		46.53	-46.53
8030-001 Background Checks		1,100.00	-1,100.00	1,100.00
8040-001 Bank Fees	0.00		0.00	0.00
8050-001 Investment Fees	1,530.11	0.00	1,530.11	-1,530.11
8100-001 Committee - Achievement		4,000.00	-4,000.00	4,000.00
8100-010 Committee - Key Club International		1,500.00	-1,500.00	1,500.00
8100-011 Committee - Key Leader		1,000.00	-1,000.00	1,000.00
8150-001 District Project		1,250.00	-1,250.00	1,250.00
8160-001 Entertainment & A/V	12,300.61	8,000.00	4,300.61	-4,300.61
8200-001 General Meeting Expenses		12,000.00	-12,000.00	12,000.00
8410-001 Meals	9,477.01	48,030.00	-38,552.99	38,552.99
8420-001 Miscellaneous Expenses	400.00	2,200.00	-1,800.00	1,800.00
8430-002 Other Charity Dontions	1,908.50		1,908.50	-1,908.50
8435-001 New Club Support		500.00	-500.00	500.00
8445-001 Office Supplies	526.88	1,050.00	-523.12	523.12
8500-001 Officer Exp - Governor		100.00	-100.00	100.00
8500-015 Officer Exp - Secretary		100.00	-100.00	100.00
8500-035 Officer Exp - Lt. Governors	6,743.77	1,000.00	5,743.77	-5,743.77
8500-045 Officer Exp - Editor		100.00	-100.00	100.00
8500-050 Officer Exp - Webmaster		100.00	-100.00	100.00
8600-001 Pins / Badges / Shirts	1,549.40	1,300.00	249.40	-249.40
8610-001 Postage / Shipping	10.10	250.00	-239.90	239.90
8750-001 Programs & Souvenirs	4,323.77	10,220.00	-5,896.23	5,896.23
8760-001 Conference Materials	21,792.63	15,295.00	6,497.63	-6,497.63
8780-001 Speakers Fees	2,350.00	3,500.00	-1,150.00	1,150.00



# Capital District Key Club

## Budget vs. Actuals

October 2024 - September 2025

	TOTAL			
	ACTUAL	BUDGET	OVER BUDGET	REMAINING
8810-001 Printing / Supplies		1,900.00	-1,900.00	1,900.00
8900-050 Travel - Hotels/Lodging	110,409.44	62,000.00	48,409.44	-48,409.44
8900-100 Travel - Airfare	1,439.84	6,250.00	-4,810.16	4,810.16
8900-150 Travel - Automobile Expense	3,639.86		3,639.86	-3,639.86
8900-175 Travel - Other		5,825.00	-5,825.00	5,825.00
8960-001 Website / IT / Software	134.32		134.32	-134.32
<b>Total Expenditures</b>	<b>\$178,582.77</b>	<b>\$189,770.00</b>	<b>\$ -11,187.23</b>	<b>\$11,187.23</b>
NET OPERATING REVENUE	<b>\$16,278.43</b>	<b>\$0.00</b>	<b>\$16,278.43</b>	<b>\$ -16,278.43</b>
Other Expenditures				
Other Miscellaneous Expenditure	6,090.00		6,090.00	-6,090.00
<b>Total Other Expenditures</b>	<b>\$6,090.00</b>	<b>\$0.00</b>	<b>\$6,090.00</b>	<b>\$ -6,090.00</b>
NET OTHER REVENUE	<b>\$ -6,090.00</b>	<b>\$0.00</b>	<b>\$ -6,090.00</b>	<b>\$6,090.00</b>
NET REVENUE	<b>\$10,188.43</b>	<b>\$0.00</b>	<b>\$10,188.43</b>	<b>\$ -10,188.43</b>





# Capital District Circle K

## Budget vs. Actuals

October 2024 - September 2025

	TOTAL			
	ACTUAL	BUDGET	OVER BUDGET	REMAINING
Revenue				
4300 Morgan Stanley Cash Interest	2.82		2.82	-2.82
7000-001 Income - Membership Dues	2,040.00	2,750.00	-710.00	710.00
7100-001 Income - Registration & Event Fees	4,671.97		4,671.97	-4,671.97
7150-001 Income - Fundraising		1,000.00	-1,000.00	1,000.00
7200-002 Income - Advertising/Sponsorship	250.00		250.00	-250.00
7450-001 Income - CDKF Subsidy		5,500.00	-5,500.00	5,500.00
<b>Total Revenue</b>	<b>\$6,964.79</b>	<b>\$9,250.00</b>	<b>\$ -2,285.21</b>	<b>\$2,285.21</b>
GROSS PROFIT	<b>\$6,964.79</b>	<b>\$9,250.00</b>	<b>\$ -2,285.21</b>	<b>\$2,285.21</b>
Expenditures				
8040-001 Bank Fees	0.00		0.00	0.00
8100-001 Committee - Achievement		200.00	-200.00	200.00
8100-006 Committee - Club Building/Revitalization		500.00	-500.00	500.00
8100-007 Committee - Conference/Convention		30.00	-30.00	30.00
8100-012 Committee - Kiwanis-Family		30.00	-30.00	30.00
8100-018 Committee - Membership	151.04	435.00	-283.96	283.96
8100-019 Committee - On-to-ICON		60.00	-60.00	60.00
8100-025 Committee - Service / Signature Project		100.00	-100.00	100.00
8410-001 Meals	2,192.67	200.00	1,992.67	-1,992.67
8430-001 Kiwanis Children's Fund Donations		500.00	-500.00	500.00
8500-001 Officer Exp - Governor		300.00	-300.00	300.00
8500-015 Officer Exp - Secretary		100.00	-100.00	100.00
8500-035 Officer Exp - Lt. Governors		100.00	-100.00	100.00
8500-055 Officer Exp - Communications Coordinator		100.00	-100.00	100.00
8600-001 Pins / Badges / Shirts	125.66	250.00	-124.34	124.34
8610-001 Postage / Shipping		150.00	-150.00	150.00
8760-001 Conference Materials	386.06	1,250.00	-863.94	863.94
8780-001 Speakers Fees	54.90		54.90	-54.90
8810-001 Printing / Supplies		175.00	-175.00	175.00
8900-050 Travel - Hotels/Lodging	985.36	3,350.00	-2,364.64	2,364.64
8900-100 Travel - Airfare		1,000.00	-1,000.00	1,000.00
8900-150 Travel - Automobile Expense	29.45		29.45	-29.45
8960-001 Website / IT / Software	159.20	420.00	-260.80	260.80
<b>Total Expenditures</b>	<b>\$4,084.34</b>	<b>\$9,250.00</b>	<b>\$ -5,165.66</b>	<b>\$5,165.66</b>
NET OPERATING REVENUE	<b>\$2,880.45</b>	<b>\$0.00</b>	<b>\$2,880.45</b>	<b>\$ -2,880.45</b>
NET REVENUE	<b>\$2,880.45</b>	<b>\$0.00</b>	<b>\$2,880.45</b>	<b>\$ -2,880.45</b>



Jeffrey Wolff &lt;jmwolff@gmail.com&gt;

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## New District Trustee Board Report from Blue Ridge

1 message

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jeffrey.wolff@capitalkiwanis.org <noreply@kiwanis.org>

Wed, Jul 30, 2025 at 1:31 PM

Reply-To: jeffrey.wolff@capitalkiwanis.org

To: jeffrey.wolff@capitalkiwanis.org

### Region Name

Blue Ridge

### Membership

Division 4 has seen positive growth for the year and I know a few of the clubs have members they expect to add. Division 8 also has seen positive growth. While these are good signs as always I suspect there will be some members will be dropped at the end of the year.

### Plans for New Kiwanis or SLP Clubs

The only plan for a new addition is the Westminster Club is looking to add a new Key Club at Gateway HS. This came as a result of a KI contact by a Guidance Counselor of this school who was a former Key Clubber.

### District Committee Updates

none

### Other Challenges or Assistance Needed

As this Region is being discontinued there are no challenges or assistance needed.

### Other Comments

I do have a major concern as a Club leader. Every month the report asks if the club was contacted by a Lt. Governor or Foundation Representative. We saw our Lt. Governor once (contact visit) and there were no other contact whatsoever including a virtual. I thought three visits were mandatory. Had NO contact from the Foundation.



Jeffrey Wolff &lt;jmwolff@gmail.com&gt;

## New District Trustee Board Report from Heart of Virginia

1 message

jeffrey.wolff@capitalkiwanis.org &lt;noreply@kiwanis.org&gt;

Fri, Aug 1, 2025 at 9:30 PM

Reply-To: jeffrey.wolff@capitalkiwanis.org

To: jeffrey.wolff@capitalkiwanis.org

### Region Name

Heart of Virginia

### Membership

Clubs are up and down for all. Most are doing open houses for new members. Really like to work on the branding for our region. Don't know if this is possible and should I take this up with Membership chair(s) I know this is something that can really help everyone and people have tried before.

Waynesboro celebrated their one hundred year anniversary and it was a great turnout and history lesson.

### Plans for New Kiwanis or SLP Clubs

Petersburg is working on bringing back Circle K to VSU.

Richmond lost talks with VCU, but I would not give up on that. Lizzie (From the mental health committee) might be a great choice to contact to start that back up.

Tuckahoe is trying to start back up a key club in the area

I have not heard of any new clubs in DIV 9, but they have some amazing clubs doing lots of great stuff.

### District Committee Updates

Mental health and wellness committee had a webinar on July 31 on Trauma and how to deal with it. Their next webinar will be in September on how to make your own stress balls and other ways to release stress in positive ways. This committee has work all year and has 3 great webinars, many posters, many post on IG and facebook. The committee chair should be recognize for her amazing job she has done this year. Of course she will not take credit and call it a team effort. Which is partial right. It has been a great team to work with this year, but also her leadership kept us motivated. At the request of Tim I will be taking over chair next year with the plan to keep as many members from this year on the team and get some more from all three parts of Kiwanis. Kyle and Lizzie will be leading the webinar in September even though they will no longer be in Key club, but currently are in college now. I would like to recognized them as well for all their hard work this year. One of the new key clubber that has join us is Emma and she is doing great job with the transition. And of course all the Kiwanis members that have help throughout the year. We did get our first Circle K member to join and will be looking for more.

### Other Challenges or Assistance Needed

Div 9

Rockbridge? New club but concern with lost of members

Div 10

The same ones as always

Central Chesterfield and Dinwiddie

And soon Short Pump will be closing with its one member, but John Morris thinks the east end club will be open soon

### Other Comments

Commend John Morris and his team working on opening a new club in the east end.

I would like to also commend my two amazing LTG's that have done an amazing job this year. And looks like we have two more amazing LTG's taking their places. And I know Sam will do an excellent job as trustee. i still think the HOV needs a new name when 8 comes in with 9 and 10, but I am only me.

On a personally note I am honor to have served as Trustee for the HOV the last three years. I didn't serve on any other committees than the mental health taskforce this year and was a little disappointed in that, but i knew why. Maybe not the time or place, and not even sure who even reads this reports, but if you do thank you! So I will finish with saying how proud I am to serve my region and wherever my future may lead me in Kiwanis.



Jeffrey Wolff &lt;jmwolff@gmail.com&gt;

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## New District Trustee Board Report from National Capital

1 message

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jeffrey.wolff@capitalkiwanis.org <noreply@kiwanis.org>

Thu, Jul 31, 2025 at 6:34 PM

Reply-To: jeffrey.wolff@capitalkiwanis.org

To: jeffrey.wolff@capitalkiwanis.org

### Region Name

National Capital

### Membership

Division 1: Far East is not meeting

NW needs help but wont ask for it.

WDC is a success story they continue to serve their community. They provided 14 Scholarships to deserving students .Waldorf has been revived, they are doing great projects.

Division 2:

Arlington's membership/ recruitment is still a problem.

Woodbridge is the shining star in the Division.

Division 3:

The Bethesda Club is involved in many outstanding community projects and partnerships.

### Plans for New Kiwanis or SLP Clubs

Division 3 is working on completing the opening of the Laurel Club.

I have not heard of any new SLP Clubs .

### District Committee Updates

I am a member of the District By Laws Committee under the Leadership of David Laurie.

### Other Challenges or Assistance Needed

I think that the main challenge for most of our Clubs is the declining age of many of our members and our lack of expertise in recruiting new young members.

We need a young dynamic coach to inspire, motivate and encourage new young members to join Kiwanis.

We need to recreate the Kiwanis brand so we can add some excitement and new projects to be able to appeal to younger clientele.

### Other Comments

The strength of Divisions, 1, 2, and 3 is the commitment of the Lt. Governors, Lindwood, Rob and Seth. They work very hard to achieve success!!



Jeffrey Wolff &lt;jmwolff@gmail.com&gt;

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## New District Trustee Board Report from Southeast Virginia

1 message

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jeffrey.wolff@capitalkiwanis.org <noreply@kiwanis.org>

Wed, Jul 30, 2025 at 10:30 AM

Reply-To: jeffrey.wolff@capitalkiwanis.org

To: jeffrey.wolff@capitalkiwanis.org

### Region Name

Southeast Virginia

### Membership

Division 12 has 2 struggling clubs: Gloucester and Matthews. Gloucester needs a boost as their biggest obstacle is attracting new members. They also need some help with meeting format and creating energy and a sense of fun in their meetings.

Division 13 reports no major issues. Smithfield, an active and vibrant club, lags on reporting in. I was concerned that only 3 people, plus myself, attended the last DCM. Scheduling difficulties caused the LTG to move it to Zoom, but attendance was low.

Division 14 reports no major issues. Great participation in their DCM: all clubs present.

### Plans for New Kiwanis or SLP Clubs

The 2 newest clubs in the region, Tri-Cities and North Suffolk, are doing well. No other plans have been reported.

### District Committee Updates

Finance COmmittee meets before the next Board meeting.

Redivisioning COmmittee has submitted its final report which will be discussed at the next Board meeting.

### Other Challenges or Assistance Needed

None for now.

### Other Comments

It's a busy time in Southeast Virginia. CLE for the Region was held 7-12-5 and was very well attended. The Southeast Virginia Regional Fishing clinic resulted in 2 days of service with participation from members in Division 12, 13 and 14. 350 kids, ages 8-13, were fed breakfast and lunch, learned about the Chesapeake Bay environment, fished off the Buckroe Beach pier and got to take their T-shirt and fishing rods home. The region had fair representation at ICON in Pittsburgh.



Jeffrey Wolff &lt;jmwolff@gmail.com&gt;

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## New District Trustee Board Report from Southwest

1 message

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jeffrey.wolff@capitalkiwanis.org <noreply@kiwanis.org>

Fri, Aug 1, 2025 at 5:04 PM

Reply-To: jeffrey.wolff@capitalkiwanis.org

To: jeffrey.wolff@capitalkiwanis.org

### Region Name

Southwest

### Membership

SW has a significant deficit due to St. Paul/Castlewood closing. Aside from that loss we are down slightly. 16 is leading in growth.

In reviewing each club's election reports we are sorely lacking in membership chairs. One division only has 1 in 4 clubs having a membership chair. Clubs don't want to hear about membership from the perspective of Capital needing the numbers or International. We have to apply it to THEM and what will happen to their club is they do not grow. Challenges need to be addressed honestly at club level.

I'm going to do visits in Div. 15 in the next couple months and hope to join the new LTGs as we strategize for growth and relay tangible strategies and why they should implement them.

### Plans for New Kiwanis or SLP Clubs

Forest is working on a Key Club at Heritage and exploring Builders Cub opportunities.

It's becoming more difficult to recruit advisors in the schools and also members who can be advisors and attend meetings.

### District Committee Updates

The Possible Capital Redivision Committee chaired by Art Riley report has been submitted.

The Longe Range Planning Committe on SLPS Report is in progress. We are completing a SWOT and if not complete by DCON, it will be ready by Family Weekend in September.

### Other Challenges or Assistance Needed

Many clubs in Div 16 have not submitted election results and a few in 15 are outstanding. 17 only has one out. Reminders and asks are in process. 16 LTG has of today not submitted a report.

### Other Comments

Having an active membership chair is vital and will be a focus.

As I visit clubs late summer/early fall, I will be encouraging clubs to budget for attendees at this coming year's MIDYEAR, ICON and DCON. I think we need to do a better job of really explaining to a club What's in it FOR THEM.



Jeffrey Wolff &lt;jmwolff@gmail.com&gt;

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## New District Trustee Board Report from West Virginia

1 message

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jeffrey.wolff@capitalkiwanis.org <noreply@kiwanis.org>

Fri, Aug 1, 2025 at 4:43 PM

Reply-To: jeffrey.wolff@capitalkiwanis.org

To: jeffrey.wolff@capitalkiwanis.org

### Region Name

West Virginia

### Membership

West Charleston and Wheeling have both discussed boosts. Ive told both clubs that I will be available to help in anyway I can.

### Plans for New Kiwanis or SLP Clubs

Need to talk to Stacy about Marshall and WVU, I was told there was preliminary talk about one being built at Pierpont (near Fairmont).

### District Committee Updates

Carrie Wagner will be teaching a session for the service committee on Saturday morning.

### Other Challenges or Assistance Needed

Helping clubs get over their own apathy and getting excited about being in Kiwanis and excited about District and International leadership and functions.

### Other Comments

It has been an honor and a pleasure to serve as the WV trustee for the last three years. I have enjoyed it and had a lot of fun and most importantly made some amazing friends.





Jeffrey Wolff &lt;jmwolff@gmail.com&gt;

## New Committee Chairperson Board Report from Builders Club

1 message

jeffrey.wolff@capitalkiwanis.org &lt;noreply@kiwanis.org&gt;

Wed, Jul 30, 2025 at 10:04 PM

Reply-To: jeffrey.wolff@capitalkiwanis.org

To: jeffrey.wolff@capitalkiwanis.org

### District Committee / Key Staff Name

Builders Club

### Committee Chairperson's Name

Elana Gardner

### Committee Membership

The District SLP advisory committee to Builders Club has been vacant since mid January Recruitment for committee members will be announced in the upcoming Capital Kiwanian, inquires will be made at DCON and a request will be sent via email newsletter.

### Committee Goals & Current Status

There was no administrator for the 2024- 2025 SLP year so to the best of my knowledge no goals were submitted. Builders Club is currently made up of 27 active clubs (2 new charters and 3 recharterers), 5 inactive clubs and 7 clubs that went into charter revocation. Active clubs are located in DE (1), MD (5), VA (17) and WV (4). Club kits contain supplies for up to 60 members and supplemental kits an additional 30 members. Based on supplemental kits ordered the two largest clubs would be the Tome School (MD) and Charles Town Middle (WV). Neither club submitted for awards or officer recognition. Shady Grove MS President Laila was the only recognition from our district. All active clubs show a membership count of 0 or 1.

K-Kids is currently made up of 36 active clubs (6 new charters and 2 recharterers), 3 inactive clubs and 17 clubs that went into charter revocation. Active clubs are located in DE (1), MD (12), VA (13) and WV (10). Club kits contain supplies for up to 60 members and supplemental kits an additional 30 members. Based on supplemental kits ordered the three largest clubs would be the Bettie Weaver Elementary (VA), Wright Denny Intermediate and Page Jackson Elementary Schools (WV). None submitted for awards or officer recognition. Poquoson Elementary President Claire was the only recognition from our district. All active clubs show a membership count of 0- 2.

There are no metrics available to me for Terrific Kids and BUG at this time.

### Other Challenges or Assistance Needed

In June KI announced that there would be a proposed increase to the annual club renewal fee. That increase has now been confirmed to be \$20.00 and the new fee for 2025- 2026 clubs will be \$235.00. Club secretaries will be reminded to make sure that advisors have been noted and to check the status of those advisors background checks. In the event that members for the Advisory Committee cannot be found then encouragement from all levels of leadership to recognize the clubs and their officers and support of the annual Global Project which will be announced on October 1st will be helpful for the upcoming year.

Metrics for Terrific Kids and BUG from Club Monthly or Annual Reports would be helpful in identifying how to engage Kiwanis Clubs especially those without SLPs to introduce the Kiwanis family into the lives of young people.

### Other Comments

Administrator Engage training was held in June and it appears at the Kiwanis Advisor level that monthly reporting is available from October through July and the data will be included into official statistics becoming visible to the district and Kiwanis International. At this time the following questions are on the report:

1. Is your club located in a school or community organization? \*
2. Which options best describe your school? \* Public School, Non-faith based private school, Charter School, Faith-based school, Other
3. How many students are enrolled at your school? \*
4. How many years has your club existed at your school?

Kiwanis Advisors will be encouraged to utilize this reporting and this will shift the reporting of this information from the sponsoring Kiwanis Club Secretary.

KI conducted an End of Year Advisors survey April 1- May 15. The results have not been shared at this time. The Faculty

Advisor Council applications were also open during that time. This is a voluntary opportunity renewable for up to three years with the term starting August 2025 and ending May 2026.

The council's purpose: To provide Kiwanis Youth Programs with the unique perspectives of faculty advisors about Builders Club resources, program support and what advisors and clubs need.

The council's work for 2025-26 will be to:

1. Provide ideas for the development of new Builders Club resources available for download from the website (including meeting kits and ideas for service, fundraising, donations and advocacy projects).
2. Review materials that were revised based on feedback from the 2024-25 council.
3. Review current resources for parents and families and provide input for development of new resources.



Jeffrey Wolff &lt;jmwolff@gmail.com&gt;

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## New Committee Chairperson Board Report from Bylaws & Policies

1 message

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**jeffrey.wolff@capitalkiwanis.org** <noreply@kiwanis.org>

Tue, Jul 29, 2025 at 8:56 AM

Reply-To: jeffrey.wolff@capitalkiwanis.org

To: jeffrey.wolff@capitalkiwanis.org

**District Committee / Key Staff Name**

Bylaws &amp; Policies

**Committee Chairperson's Name**

David Lurie

**Committee Membership**

Marie Quick, Charles Marks, Scott Zimmerman, Nancy Simonelli, Caren Schumacher, Eric Lamb, Joshua Hiscock, Jeffrey Wolff and Tim Gillette. No current vacancies.

**Committee Goals & Current Status**

Revise all Capital District bylaws and policies related to changes that may occur because of the Annual Business Meeting at the 2024 Kiwanis International Convention. Current Status - submitted required changes to District Board for approval at August meeting 100% complete

Recommend bylaw amendments and policy changes that will assist in the implementation of the Capital District's long range plan. Current status - no requested changes received to date from the Board or Long Range Planning committee. 100% complete

Review convention and conference policies and procedures to ensure consistency with current practices and provide recommendation to the District Board. Current status - committee submitted revised document to District Board for approval at August meeting. 100% complete.

Review recommendations from Capital District committees with policy implications and provide recommendations to the District Board. Current status - requested changes based on audit results for Executive Director reimbursement and Past Lt. Governor's committee submitted for approval at August board meeting. 100% complete.

**Other Challenges or Assistance Needed**

No Challenges or Assistance Needed at this time

**Other Comments**

Based on the report for the redivisioning committee and subsequent discussion from the District Board, additional policy code changes made be required.

Additional refinement for convention manual should include a timeline of when critical activities should be completed in order for the preparations for convention and conferences to proceed in a smooth manner. Development of checklists for each member of the convention committee may also want to be considered and can easily be derived from the revised duties listed in the policy code.



Jeffrey Wolff &lt;jmwolff@gmail.com&gt;

## New Committee Chairperson Board Report from CKI (Circle K International)

1 message

jeffrey.wolff@capitalkiwanis.org &lt;noreply@kiwanis.org&gt;

Fri, Aug 1, 2025 at 11:12 PM

Reply-To: jeffrey.wolff@capitalkiwanis.org

To: jeffrey.wolff@capitalkiwanis.org

### District Committee / Key Staff Name

CKI (Circle K International)

### Committee Chairperson's Name

Stacy Whitehouse

### Committee Membership

Catie Dugan Vargas

Jose Leoncio

Elana Gardner

Robert Lyons

### Committee Goals & Current Status

1. Membership: Achieve 100 members between October 1 and December 15, 2025, and 275 members by March 31, 2026  
Updates:

- June 2025: Held virtual Recruitment and Retention training attended by four clubs; held additional individual club consulting calls.
- Holding Kiwanis Engage Training for officers on August 4
- Working on Fall recruitment kit
- Working on compiled postsecondary institution list across the Capital District to conduct outreach to schools re: potential charters.

2. Club Growth: Charter 2 clubs and reactivate 2 clubs by March 31, 2026.

- Reconnected with Hampton University charter contact
- Focus this summer has been mostly on staying connected with clubs who did not have club boards at the end of the academic year and finding avenues to revitalize (GMU and VSU)

3. Service Hours: Achieve 1,500 service hours district-wide by March 31, 2026.

- Despite encouragement and reminders, most clubs have not completed an MRF since April. We are holding officer training on August 4 to walk through the new Engage platform and emphasize the benefits of completing an

4. Kiwanis Family Events and Interclubs: Achieve 20 Kiwanis Family Events held by CKI clubs by March 31, 2026, and each active club conduct 1 interclub with another CKI club by March 31, 2026.

- CKI and Key Club alumni event scheduled for
- Board Planning to discuss CKI Week and Celebrating Community (replacement for Kiwanis One Day)
- Governor Dylan Luong spoke at Key Club Board Training and Capital District Kiwanis Foundation Meetings.
- DC Kiwanis met with Howard and American University at ICON.

5. District Events: Achieve 25% increase in CKI attendance at Fall Rally, and achieve a 40% increase in CKI attendance at 2026 District Convention.

- Received approval for CKI Kiwanis Committee Member and District board member to be part of the Fall Rally planning committee (will be held jointly with Key Club)

### Other Challenges or Assistance Needed

Nothing new at this time.

### Other Comments

As of this month, 4 of the 6 board positions have been filled (previously only the Governor as of April 1). Board training has been held virtually as all but one board member had commitments outside of the Capital District this summer.

CKI international dues will increase again this year as part of the multi-year action that was voted on by the House of Delegates at the 2024 CKI International Convention. International dues will now cost \$36 per member as of October 1, 2025.

Thank you for your consideration of our budget and support for CKI. Recent actions by the International Board regarding the Kiwanis Voices pilot and the Committee on CKI have created some unknowns, but also energy and opportunity to keep restoring our growth. We are committed to expanding clubs and membership to expand CDCKI's footprint and contribution to the Kiwanis Family. If you can, please stop by our CKI/Key Club alumni reception at Kiwanis DCON on Friday, August 22 from 6-7:30pm at La Posada, a less than 10 minute walk from the hotel.



Jeffrey Wolff &lt;jmwolff@gmail.com&gt;

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## New Committee Chairperson Board Report from Key Club

1 message

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jeffrey.wolff@capitalkiwanis.org <noreply@kiwanis.org>

Wed, Jul 30, 2025 at 6:29 PM

Reply-To: jeffrey.wolff@capitalkiwanis.org

To: jeffrey.wolff@capitalkiwanis.org

**District Committee / Key Staff Name**

Key Club

**Committee Chairperson's Name**

Kristina Dlugozima

**Committee Membership**

Fully staffed - the committee is made up of the following Kiwanians:

Nicole McDermott

Jeffrey Wolff

Cory Fore

Liz Moore

Jennifer Hiscock

Angie Moore

Ginny Grant

Michelle Yuth

John Richards

Mic Platt

Karen Roberts

Jeannette Ogilvie

John Kyle

**Committee Goals & Current Status**

Increase membership by 5% over the end of the year (ended year at 11,657 - goal of 12,240) through increased focus on membership and chartering/reactivating clubs - Current membership (as of 04/24) is 12,061 in 214 clubs. Goal Achieved!

Create a 3 year strategic plan for the Capital District of Key Club - This is in progress

Fully launch fundraising campaign for Foundation fund for students on free and reduced lunches (dues and events subsidizing) and non-sponsored Key Clubs (events subsidizing as needed) with a goal to raise \$5,000 - This is also in progress Liz Moore has joined the adult committee to help work on the two initiatives above. We are beginning both items now and expect to complete before the end of the Kiwanis year

**Other Challenges or Assistance Needed**

The primary challenge for Key Club that requires Kiwanis help is sponsorship with the building of Kiwanis Clubs in areas where Key Clubs are numerous and Kiwanis Clubs are sparse. In the past year I have received inquiries from students within Divisions 3 and 4 where I have been unable to find them a sponsor. Loudoun County in Division 2 is another area where there is only one Kiwanis Club and many high schools.

Other challenges for Key Club are finding student leaders, encouraging attendance at divisional, district, and international events, finding and retaining faculty advisors, understanding and training adults on mental health issues facing students today.

**Other Comments**

25 Capital District students and advisors attended Key Club International Convention in Orlando, FL from July 1-6th. The event included several speakers including Senator Bill Nelson, Coach Vera "VJ" Bustos, Unicef Ambassador and actress Aria Mia Loberti, and Key Club Alumni working in PR, Law, Public Service, and Finance. Students and advisors were able to attend informative workshops including an improv one presented by Djibril Wone from Alexandria City High School. Award winners included Distinguished Editor - Veronica Vitko, Albemarle High School, Robert F. Lucas Distinguished

Lieutenant Governors – Hazim Ahmad, Henry Fesperman, Izzy Maly, Kate Lee, Kyle Patrick Janer, Natalie Stopf, Nicole Jia and Tori Tarrant. International Trustee Ariana Lee of Woodside High School was awarded the Outstanding Board Member Award. At the House of Delegates, Izzy Maly of Severna Park High School was elected to one of the International Trustee positions on the International Board of Officers!



Jeffrey Wolff &lt;jmwolff@gmail.com&gt;

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## New Committee Chairperson Board Report from Leadership & Education

1 message

jeffrey.wolff@capitalkiwanis.org &lt;noreply@kiwanis.org&gt;

Wed, Jul 30, 2025 at 1:06 AM

Reply-To: jeffrey.wolff@capitalkiwanis.org

To: jeffrey.wolff@capitalkiwanis.org

### District Committee / Key Staff Name

Leadership &amp; Education

### Committee Chairperson's Name

Sam Bosserman

### Committee Membership

Current membership has not since since last report.

### Committee Goals & Current Status

Recruit and train 18 new certified club leadership education trainers with at least 1 new trainer per division. (Goal for completion: May 2025)

In progress. An email to all prospective CLE trainers and past LTGs was sent out in March to gather interest. There was very little response from new CLE trainers- current CLE trainers responded well! A few past LTGs responded that they were no longer in Kiwanis or have moved out of the District. Current CLE trainers have been asked to help recruit new trainers. The incoming Chair of the Committee is aware of this important need.

Host quarterly virtual education opportunities in conjunction with committee chairs. Proposed schedule: November-February - May - August (early) (Goal for completion: September 2025)

In progress. A Google Doc was created and reminders sent to current committee chairs to schedule a training on the schedule. To date three committees have utilized the calendar. The Youth and Adult Mental Health and Wellbeing Committee and Risk Manager are actively hosting webinars.

Develop and implement marketing plan for ongoing educational opportunities, including revised and updated CLE trainings. (Goal for completion: March 2025)

Complete. CLEs are in process and were advertised on the district website, via email and in the Capital Kiwanian.

Revise and update process of creating the CLE training schedule including create how tos, and encourage a sense of ownership of CLE trainings. (Goal for completion: April 2025)

Completed. A detailed CLE Guide was created and sent out to current LTGs. I met with current LTGs to review the Guide and to create the ownership of the CLE trainings. This has also been shared with the incoming committee chair.

Work with Leadership Team on education offerings at Mid Year and DCON (Goal for completion: February/July 2025)

Available to help wherever needed!

### Other Challenges or Assistance Needed

I am working with Jenn to transition the committee over to her! :-) My Goal is to leave her with as many materials, resources, and correspondence as possible, as I was provided with almost nothing... which I do think is something that will help this committee enhance each year rather than having to spend a year to rebuild it during each transition.

### Other Comments

Thank you for the opportunity to serve!





Jeffrey Wolff &lt;jmwolff@gmail.com&gt;

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## New Committee Chairperson Board Report from Membership & Engagement

1 message

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jeffrey.wolff@capitalkiwanis.org <noreply@kiwanis.org>

Fri, Aug 1, 2025 at 12:13 AM

Reply-To: jeffrey.wolff@capitalkiwanis.org

To: jeffrey.wolff@capitalkiwanis.org

### District Committee / Key Staff Name

Membership & Engagement

### Committee Chairperson's Name

Alisa Dick

### Committee Membership

Alisa Dick

Jen Wolff

Eric Lamb

### Committee Goals & Current Status

Article for Capital Kiwanian – bimonthly – completed

Membership Inquiries – completed in a timely manner

Participation in District Meetings (when invited)

### Other Challenges or Assistance Needed

N/A for retention

### Other Comments

Jen will report on builds

Eric will report on boosts



Jeffrey Wolff &lt;jmwolff@gmail.com&gt;

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## New Committee Chairperson Board Report from Partnerships

1 message

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jeffrey.wolff@capitalkiwanis.org <noreply@kiwanis.org>

Fri, Aug 1, 2025 at 11:35 PM

Reply-To: jeffrey.wolff@capitalkiwanis.org

To: jeffrey.wolff@capitalkiwanis.org

### District Committee / Key Staff Name

Partnerships

### Committee Chairperson's Name

Ron McCallum

### Committee Membership

"One man band"

### Committee Goals & Current Status

See note below.

### Other Challenges or Assistance Needed

Having suffered an Occipital Stroke in February 2025, in addition to some cardiac "challenges", I have not been able to execute many of the duties of the Partnership Coordinator and probably need to resign from the position. I will offer to train my successor within my current capabilities.

### Other Comments

See note above.



Jeffrey Wolff &lt;jmwolff@gmail.com&gt;

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## New Committee Chairperson Board Report from Service / Signature Projects

1 message

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jeffrey.wolff@capitalkiwanis.org <noreply@kiwanis.org>

Fri, Aug 1, 2025 at 8:11 PM

Reply-To: jeffrey.wolff@capitalkiwanis.org

To: jeffrey.wolff@capitalkiwanis.org

**District Committee / Key Staff Name**

Service / Signature Projects

**Committee Chairperson's Name**

Carrie Wagner

**Committee Membership**

Carrie Wagner

Cory Fore

Susan Knick

**Committee Goals & Current Status**

June and July, I met with my committee to discuss our education class for DCON. Our class is " A blueprint for a Signature Project. "

June and July my committee was busy pricing schools supplies, backpacks for the DCON service project.

Currently everything has been purchased and delivered for the DCON service project. I just need to get books.

Our committee is looking forward to meeting the Signature Project contest winners and I will be announcing them on Saturday at DCON.

I have had an article in the Capital Kiwanian for each issue this year. My June/July article announced our district Signature Project winners. I am finishing up my article for the August/ September edition.

Recently sent Michelle some items to post on FB for Service reminders and suggestions. I haven't posted as many posts, as I wanted to this year. My committee is working on several to promote service to end the year strong.

At ICON, I got some great ideas to promote service and I am going to have a table at DCON to promote both the Signature Projects and service ideas with handouts and sample projects on display.

Education: I have a zoom education scheduled for Sunday, September 14th at 7:00 -8:00 pm. I am either going to teach my DCON class for those that missed our create a new one to help with Service ideas and planning.

I really enjoyed going to ICON, and learning from everyone. I got some great ideas for service and ways to promote Signature Projects better.

I have made a google doc and flyer to recruit new members

**Other Challenges or Assistance Needed**

Right now all is going good.

I could always use more committee members, but my members are great and we work well as a team.

but I have made a google doc and flyer to recruit new members for 2025-2026, that I am going to send out right before DCON and have with me at my table.

**Other Comments**

I have really enjoyed being the chair of this committee and looking forward to ending the year strong and carrying the enthusiasm into next year.



Jeffrey Wolff &lt;jmwolff@gmail.com&gt;

## New Committee Chairperson Board Report from Youth & Volunteer Mental Health Task Force

1 message

jeffrey.wolff@capitalkiwanis.org <noreply@kiwanis.org>  
 Reply-To: jeffrey.wolff@capitalkiwanis.org  
 To: jeffrey.wolff@capitalkiwanis.org

Fri, Aug 1, 2025 at 8:16 PM

### District Committee / Key Staff Name

Youth &amp; Volunteer Mental Health Task Force

### Committee Chairperson's Name

Jenn Hiscock

### Committee Membership

Kiwanis: Blue Ridge Region (Division 4) - Jennifer Hiscock, Chair  
 Kiwanis: Heart of Virginia (Division 10) - Jamie Moore, Supervising Trustee  
 Kiwanis: Blue Ridge (Division 8) - Virginia Grant  
 Kiwanis: Southeast Virginia (Division 14) - Jessica Henley  
 Kiwanis: West Virginia (Division 20) - Nathaniel Kyle  
 Kiwanis: Heart of Virginia (Division 9) - Donna Yobs

Circle K: Ziyue Yang

Key Club: Heart of Virginia (Division 10) - Elizabeth Janney  
 Key Club: National Capital (Division 2) - Kyle Patrick Janer  
 Key Club: Southeast Virginia (Division 13) - Emma Faustini  
 Key Club: National Capital (Division 3) - Julianna Newsom

There is currently no Kiwanis representative from the Southwest Virginia or DelMarVa region.

### Committee Goals & Current Status

GOAL #1: To plan, promote, and host at least one webinar each quarter of the calendar year for the Capital District Kiwanis membership; 2 focused on well-being and 2 focused on mental health.

STATUS #1: We will accomplish this goal at a 75% completion rate, as we were not able to identify a topic and plan a webinar for the first quarter of the Kiwanis year. We have planned and executed the following webinars during our year as a task force:

February 2025 - Stress: Managing the Impacts for the Better  
 July 2025 - Trauma: What It Is and How To Deal With It  
 September 2025 - Setting Yourself Up for a Successful Year: Mentally Stimulating Ways to Combat Anxiety

GOAL #2: To plan and present a training/workshop at the Capital District Kiwanis Mid-Year and Annual Conventions.

STATUS #2: We will accomplish this goal at a 50% completion rate, as the task force did not receive an invitation to present at the Mid-Year Conference. The task force was asked to present at the District Convention. Chair Jenn Hiscock, as well as next year's chair Jamie Moore, have prepared a presentation titled: Mental Health, Wellbeing, and You: Understanding the Need for Balance in Ourselves to Support Others.

GOAL #3: To support the planning of and presentation of a training/workshop at the Capital District Key Club and Circle K annual conventions.

STATUS #3: We will accomplish this goal at a 50% completion rate, as we did have the opportunity to have one of our task force members lead an advisor's round table at the Capital District Key Club Convention.

GOAL #4: To reach the Capital District membership through various communication platforms by planning, preparing, and executing a column in each Capital Kiwanian, as well as a mental health Monday tip/Well-Being Wednesday tip at least once a month on FB/Instagram.

STATUS #4: We will accomplish this goal at a 50% completion rate, as we have diligently created 2 Mental Health Monday and 2 Wellness Wednesday social media posts per month. These are posted to the Capital District Kiwanis Facebook and Instagram accounts. In addition, the task force has had a wide variety of articles and resource graphics included in the Capital Kiwanian. Further, the task force has created several one-page flier handouts that were passed out to attendees at the Mid-Year Conference, as well as will be available for attendees to pick up at District Convention.

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GOAL #5: To fulfill the committee with at least 1 Kiwanis member from each region (7), 3 members from Capital District Key Club, and 3 members from Capital District Circle K, plus a committee chair for a total of 14 members minimum.

STATUS #5: We will accomplish this goal at a 71% completion rate, as we have 5 of the 7 regions represented on our task force. At this time, we have 11 members. We were hoping to have a minimum of 14 members on the task force but have not been able to identify representation for the Southwest Virginia or DelMarVa Kiwanis regions, as well as we have had difficulty securing 3 representatives from Circle K due to the size of their board.

#### **Other Challenges or Assistance Needed**

N/A

#### **Other Comments**

\* Our task force is VERY proud of all the work we have been able to accomplish this year, especially since this is the first year the task force has been in formation!

\* Our committee meeting is on the 4th Sunday of every month at 7:30 p.m. Please find below the dates for our meetings during the 2024-2025 Kiwanis year left to date:

Sunday, August 31st at 7:30 p.m.

(This is the 5th Sunday due to many committee members being tied up at the Kiwanis District Convention on the 4th Sunday)

Sunday, September 28th at 7:30 p.m.

\* At our last meeting in July, we talked about developing a transition guide that details all of our task force work for the year, including links to resources made, graphics created, etc., so that next year's task force is well informed and does not need to start from scratch all over again.

## REPORT

Governor Appointed Committee to Address  
Possible Redivision within the Capital District

To: Joshua Hiscock

Governor, Capital District

Kiwanis International

From: Arthur Riley, Capital District Past Governor, Chair

Dennis Baugh, Capital District Past Governor

John Kyle, West Virginia District Past Governor

April Farmer, Capital District Past Lt. Governor

Missy Zimmerman, Capital District Past Lt. Governor

Seth Steel, Capital District Lt. Governor

The committee met remotely via Zoom® and discussed:

- Current alignment of Capital District Divisions
- Current population of each division by clubs and the number of members
- Reasons for the current challenge of attracting qualified members to stand for election to Lt. Governor
- Qualifications for Lt. Governor
- The advantages and disadvantages of smaller divisions vs. larger divisions

The committee acknowledges that some topics may not be related to the charge, but each topic is essential for the success of the Lt. Governor and each division. Additionally, certain recommendations may technically exceed the committee's charge but are important and should be discussed and implemented by the Capital District Board of Trustees. Furthermore, some of the recommendations may already be part of Capital District practice and may require reinforcement.

The Capital District must acknowledge the diverse characteristics of its divisions, including geographic differences, population demographics, and identified needs. To address these factors, the Governor, Lt. Governor, Lt. Governor-elect, and Trustees should collaborate annually to assess the needs of each division and individual clubs. Together, they will develop a strategy to strengthen both the divisions and their clubs, aiming to achieve their objectives by effectively distributing volunteer time and responsibilities. These good

“business’ practices should enhance the recruitment of volunteers when they understand that issues will be addressed as a team.

## **Recommendations**

- The Capital District should gravitate to larger divisions.
- The division structure should be based on the number of clubs and travel distances.
- Combine divisions 1 and 3.
- Combine divisions 4 and 6.
- Require two club visits per administrative year, by the Lt. Governor, one of which may be conducted virtually.
- The Capital District should manage the availability of Zoom® for Lt. Governors.
- Require regular contacts (preferably monthly, especially with clubs who are experiencing challenges) with club presidents via telephone or Zoom®.
- Require a minimum of four DCMs each administrative year. These meetings should serve as an important platform for communication and Kiwanis education. (These may be in person or virtual.)
- Every year, the Lt. Governor, Governor, Lt. Governor-elect, and Regional Trustee should review the status of each club within the division. They will identify the needs of the division and the resources available to support the Lt. Governor. When conducting this review, factors such as travel distances, special circumstances of volunteers, and specific requirements should be considered, along with any other relevant factors.
- When necessary to achieve the goals established by the Lt. Governor and the Governor, the Lt. Governor-elect should be engaged for support.
- When beneficial, and with the consent of the Lt. Governor, recruit an advisor (a Past Lt. Governor, current trustee, or Past Governor) to support the Lt. Governor.
- Review presidential training to ensure that presidents are aware of the support available from the Capital District and Kiwanis International.
- Clarify the role of District Trustees, particularly with potential support from Lt. Governors in larger divisions.
- Reinforce that personal contact and counseling should reinforce email communication.

Implementation of any of the committee’s recommendations will not require any Capital District By-Law changes but will require policy changes.