

# **Club Secretary & Treasurer Workshop**

Jeffrey Wolff  
Capital District Executive Director



# Welcome & Purpose

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- Support outgoing & incoming officers
- Share best practices for success
- Highlight key updates (Kiwanis Engage)
- Allow time for your questions



# Year-End Responsibilities (Current Officers)

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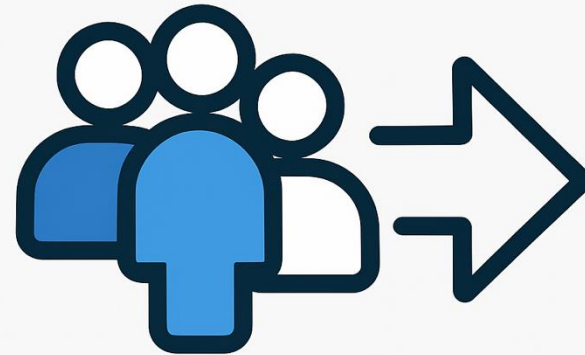
- Submit all reports by Sept. 30
- Treasurer: reconcile accounts, close books
- Prepare financial statement for board
- Pass along records, logins, files



# Preparing Incoming Officers



- Secretary: membership updates, monthly reports, meeting minutes
- Treasurer: dues billing, budget, financial tracking
- Work closely with club president & board
- Start with an October checklist/calendar

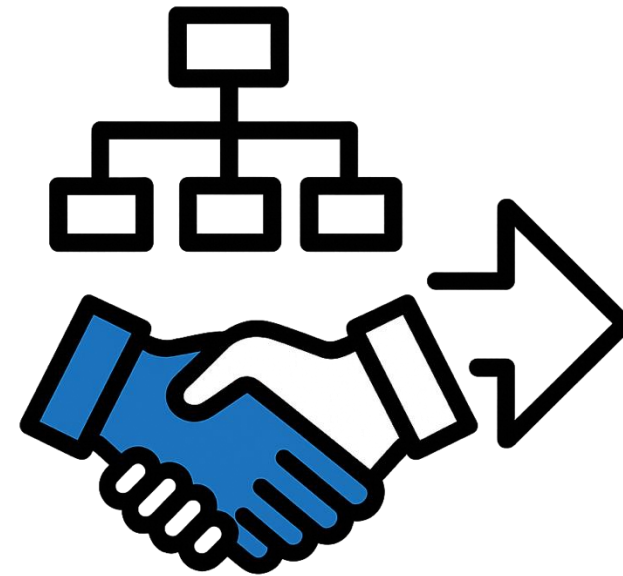


# Transition Best Practices

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- Outgoing officers share knowledge, contacts, and tools
- Use shared drives/folders for continuity
- Keep instructions simple and documented



# Kiwanis Engage




- Replaced Kiwanis Connect
- Used for: Membership management, officer reporting, dues invoicing, club reports
- Full training covered in separate session
- More features coming in the future

 **Kiwanis**

Jeffrey M. Wolff

▼ Kiwanis Club - K15461 Tysons

 My profile

Main information

Address

[Contact information](#)

Other information


Profile photo

Sponsorship

My leadership roles

Membership history

^ Main information



Jeffrey Wolff - 000000647341  
Background check is valid through Sep 11, 2026

Member number  
000000647341

Name  
Jeffrey Wolff

Preferred name

Middle name

Club name  
Tysons

Club join date  
06/23/1998

Kiwanis join date  
01/01/1985

A logo with the text 'You Belong' in a pink script font, 'HERE' in a blue box, and the Kiwanis International logo.

2025 Capital District Convention

# Best Practices for Success

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- Timely reporting = stronger clubs
- Transparency in finances
- Consistent communication with members
- Use templates, checklists, shared calendars
- Build a secretary–treasurer–president team



# Common Challenges

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- Missed deadlines → penalties or confusion
- Poor record-keeping → frustration for next officer
- Lack of communication with board
- Not asking for help when needed



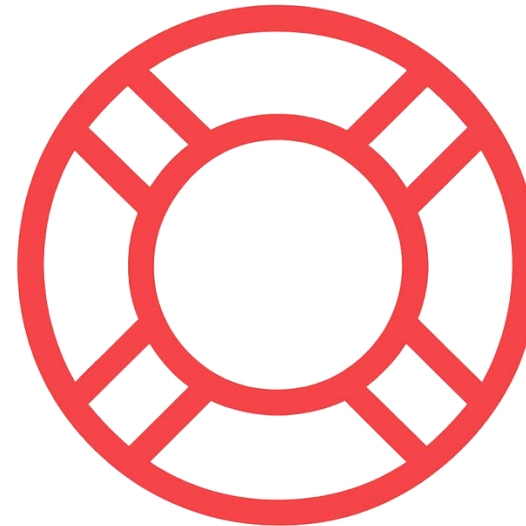


# Resources & Support

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- Capital District & Kiwanis International resources
- Online guides, templates, and FAQs
- Peer network of fellow officers
- [jeffrey.wolff@capitalkiwanis.org](mailto:jeffrey.wolff@capitalkiwanis.org)



# Key Dates to Remember

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- Sept. 30 – Year-end deadline
- Oct. 1 – New officer term begins
- October 10 – Member Drop deadline
- Dues billing cycle
- Monthly report – due the 10<sup>th</sup> of each month



# Quick Reference Tips

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- Keep everything documented
- Meet monthly with club president
- Stay ahead of deadlines
- Ask for help early
- Celebrate small wins!



# Open Q&A

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- What's on your mind?
- Current officers - challenges?
- Incoming officers: what do you need to start strong?



# Closing & Thank You

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- You are not alone — resources are here to help
- Build habits early for smoother service
- Together we strengthen our clubs!

