



# Club Secretary Education

Louisiana, Mississippi, &  
West Tennessee District

June 13, 2023



# Facilitator

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LaMissTenn District

Secretary,

Kiwanis Club of Natchitoches



# Welcome & Agenda

## Today's main topics:

- Overview of Kiwanis
- Your Role and Administrative Duties
- Annual Overview of Role
- Reporting
- Monthly Reports
- Files to be Maintained
- District information





# Our Goals



What are your expectations for today's training?



# Parking Lot

- Questions during the presentation?
- Insights or examples to share?
- *Use a post-it and place it in the parking lot!*



# Kiwanis Intl (kiwanis.org)





# LaMissTenn District (lamisstenn.org)

Facebook

Instagram

Search Here ...



**Kiwaniis**

LOUISIANA-MISSISSIPPI-WEST  
TENNESSEE DISTRICT  
Chartered in 1920

ABOUT US ▾

CALENDAR & EVENTS ▾

NEWSLETTERS

FOUNDATION ▾

RESOURCES ▾

CONTACT US ▾

**KIDS NEED KIWANIS**

**LAMISSTENN DISTRICT**

Leadership Development Survey

Search Here ...

GO

UPCOMING EVENTS



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# LaMissTenn District (lamisstenn.org)

Leadership Development Survey

District Webinar Series

CLE: Kiwanis Club Ed Hub

CLE: Leadership Guide

CLE President: President Checklist

All Club leaders and those interested are encouraged to attend this year's **virtual CLEs**.

**May 30th, 5:30pm: Club President** (1.5 hrs)  
Hosted by Greg Beard, click [HERE](#) for the CLE recording

**June 6th, 5:30pm: Club Treasurer** (1 hr)  
Hosted by Nettles Brown, click [HERE](#) for the CLE recording

**June 13th, 5:30pm: Club Secretary** (1 hr)  
Hosted by Craig Caskey, click for the [ZOOM](#)

**June 27th, 5:30pm: Membership Chair** (1 hr)



**12 MAY** 2022-2023 Kiwanis Lt. Governor Training Conference

**12 MAY** 2022-2023 Kiwanis Lt. Governor Training Conference

**12 MAY** 2022-2023 District Board Meeting

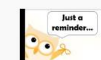
**12 MAY** 2022-2023 District Board Meeting

**14 MAY** Mother's Day

**16 MAY** Kiwanis Club of Pontchartrain Anniversary 5/16/1979

**16 MAY** 2022-2023 District Foundation Board Meeting

**22 MAY** Kiwanis Club of East St. Mary Parish Anniversary 5/22/1986



Louisiana-Mississippi-West Tennessee District of Kiwanis International

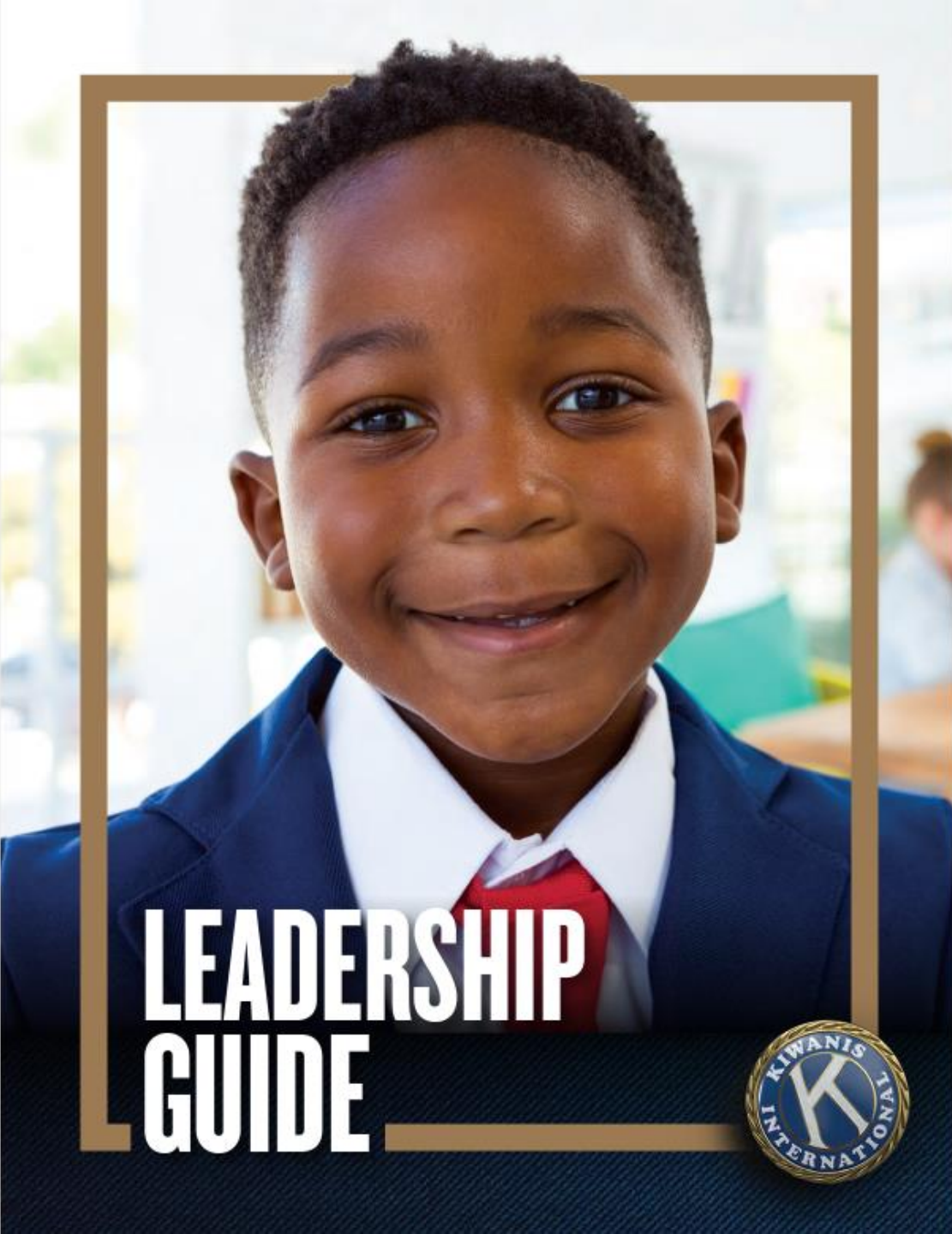
1 day ago

Calling all Club Secretaries! Monthly Club Reports Due today!

[View on Facebook](#) · [Share](#)







# Leadership Guide

<https://bit.ly/3xUQiXt>

SCAN ME







**A MESSAGE FROM KATRINA BARANKO**  
**2023-24 KIWANIS INTERNATIONAL PRESIDENT**

# Kiwanis 101

Overview of Kiwanis International





# Kiwanis 101

- **MOTTO**

Serving the children of the world.

- **DEFINING STATEMENT**

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

- **VISION STATEMENT**

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

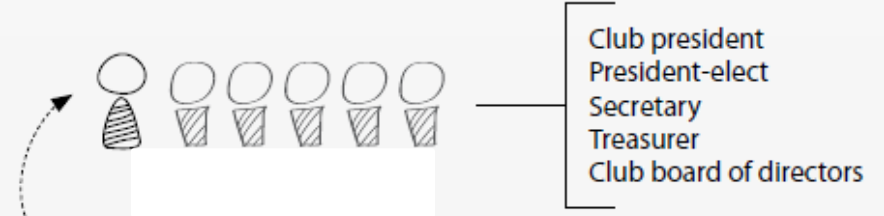


# Kiwanis Leadership Structure



## LEADERSHIP STRUCTURE

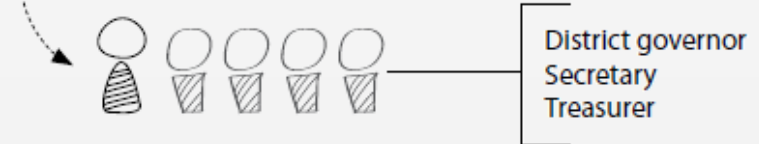
Club



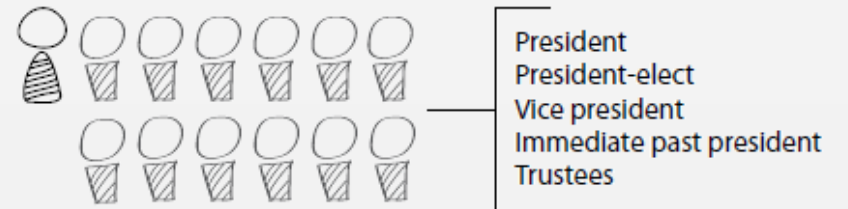
Division



District



Kiwanis  
International





# Roles & Expectations



# Duties & Responsibilities

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



## DUTIES

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

# Youth Protection Guidelines

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



**Kiwanis**<sup>®</sup>

# Youth Protection Resources



SCAN ME



<https://bit.ly/3vLdOTS>



**Kiwanis**



# Year in the Role

Tasks and Key Dates



# JUNE - JULY (before your term of office)

- Make plans to attend your Kiwanis district convention.
- Review report forms, board meeting agendas/minutes and club procedures for carrying out your responsibilities.
- Meet with the current club secretary to discuss the position and determine how you'll facilitate a smooth transition.



# AUGUST (before your term of office)

- Schedule an organizational board meeting and budget planning session with the incoming board and committee chairs by late September.
- Assist your incoming club president with committee assignments, organizing meetings and developing club goals.
- Attend your district convention and participate in club secretary education.
- Create Club Calendar with important dates.





# SEPTEMBER (before your term of office)

- Review Kiwanis International, district and division award programs.
- Record scheduled dates of lieutenant governor's and governor's official visits to your club and club board meetings.
- Check with outgoing secretary that they've updated officers for the new year. Incoming secretaries should shadow current secretary as they make roster updates.
- Start review and update your club's annual membership roster online by October 10 to ensure proper invoicing.



# OCTOBER - DECEMBER

- Finalize updates for your club's annual membership roster online by October 10.
- Check online to ensure that your club meeting location, day, time, and signature project are up to date on dashboard (and that your club appears on the online club locator).
- Review general liability insurance information with the club board of directors.
- Check for Dues Bill and send to treasurer.



# JANUARY - MARCH

- Conduct the quarterly review of your member roster and make updates online.
- Help coordinate your annual club meeting between January 1 and May 15. Be prepared to present your secretary's report.
- Report your club's two delegates and two alternates for the Kiwanis International convention to the Kiwanis International Office.
- Report your club's three delegates for your district convention to your district office by the required deadline.





# APRIL - JULY

- Finalize plans for delegates, alternates and other club members to attend the Kiwanis International convention. Be sure you've reported your delegates to the district office.
- Conduct your quarterly review of your club's member roster and make updates online.
- Submit your newly elected incoming officers online by June 1.
- Complete applications to honor club, division or district leaders with Life Member status.
- Meet with the incoming secretary to discuss duties and recommend areas for improvement.



# AUGUST - OCTOBER

- Meet with the incoming secretary to discuss duties and recommend areas for improvement.
- Review installation ceremony plans with your club president.
- Order Kiwanis International awards earned by members.
- Review and update your club's annual membership roster online by October 10 to ensure proper club invoicing.
- If your club would like to propose resolutions or amendments to the Kiwanis International Bylaws at the Kiwanis International convention, submit your proposals to the Kiwanis International Office by October 31.
- Pass on materials and records to the incoming club secretary. At the end of the year, file your club's records in permanent files.



# Reporting

Files to be Maintained





# Club Meetings



## For every club meeting:

- Work with your club president to develop the agenda.
- Check with the program committee chair for program information, setup needs and greeters.
- Take attendance.



# Monthly Board Meetings

## **For monthly board meeting:**

- Work with your club president to develop the agenda.
- Send an agenda, the previous month's board meeting minutes and a meeting reminder to board members.
- Sort correspondence, bills received, etc., for your report to the board.

- Take minutes.

## **Collect committee reports.**

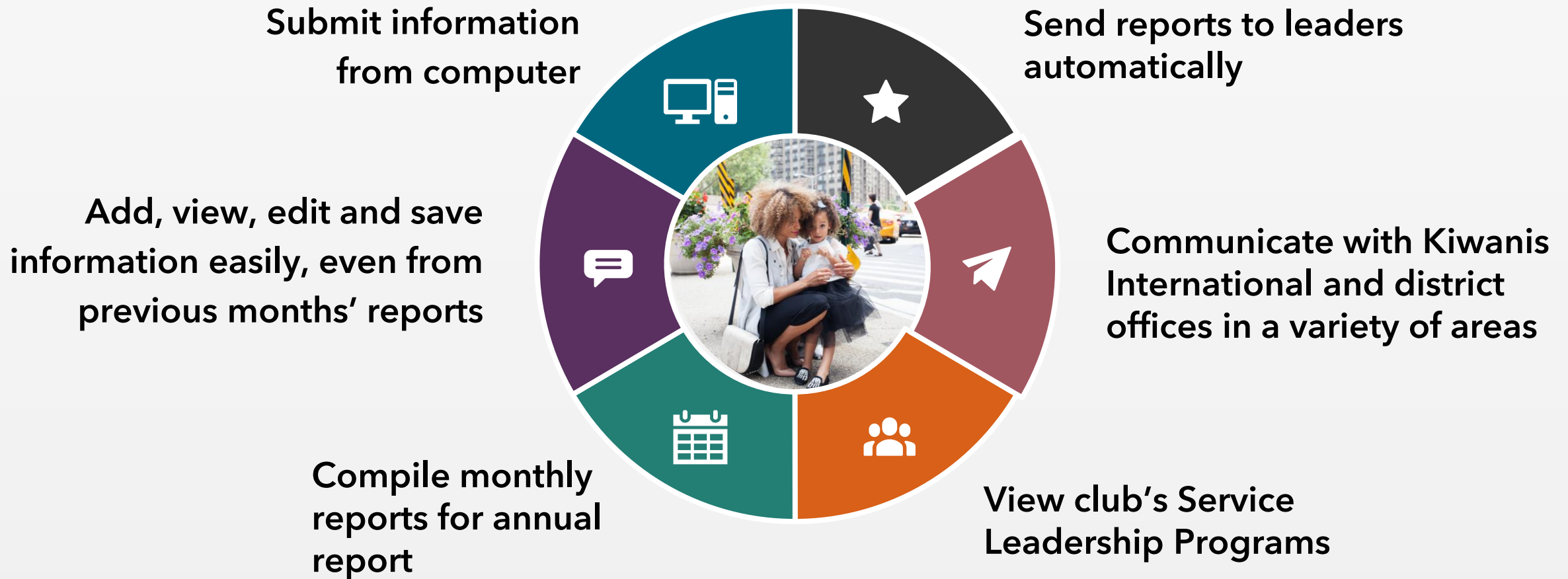
- Submit these items by the 10th of the month





# Kiwanis Online Reporting

(<https://reporting.kiwanisone.org/>)





# Club Information



## **Club secretary view displays:**

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



# Functionality

## Club secretaries have the following abilities:

- Update official club detail information
- Update club membership
- Complete monthly reports
- Submit Kiwanis convention voting delegates



# Additional Functionality



## Club secretaries have the following abilities:

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





# Permanent Files to be Maintained

These files contain records to be passed on to the succeeding secretary or the custodian of the club's permanent records.

- Board meeting minutes
- Canceled checks (seven years)
- Club newsletters
- Club meeting minutes
- Financial records and reports
- Background checks of Kiwanis advisors (seven years)
- Historic information and materials
- Invoices
- Recognitions such as:
  - ♦ Legion of Honor
  - ♦ Ruby K
  - ♦ Life member
  - ♦ Significant donations
- Lists of officers, directors and committees for each year
- Official documents related to club organization and incorporation
- Official documents related to club foundation, if applicable
- Other items of historical significance



# Club By-Laws



- The Standard Form for Club Bylaws is submitted online by the club secretary or club president.
- To access the club bylaws, log in to Kiwanis club management
- Read the "Bylaws and policies" FAQ document found at [kiwanis.org/clubbylaws](https://kiwanis.org/clubbylaws) to find the answers to common questions regarding the process before you get started
- Once all updates have been made as directed by club membership, complete and submit the online form.



# Monthly Reports

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

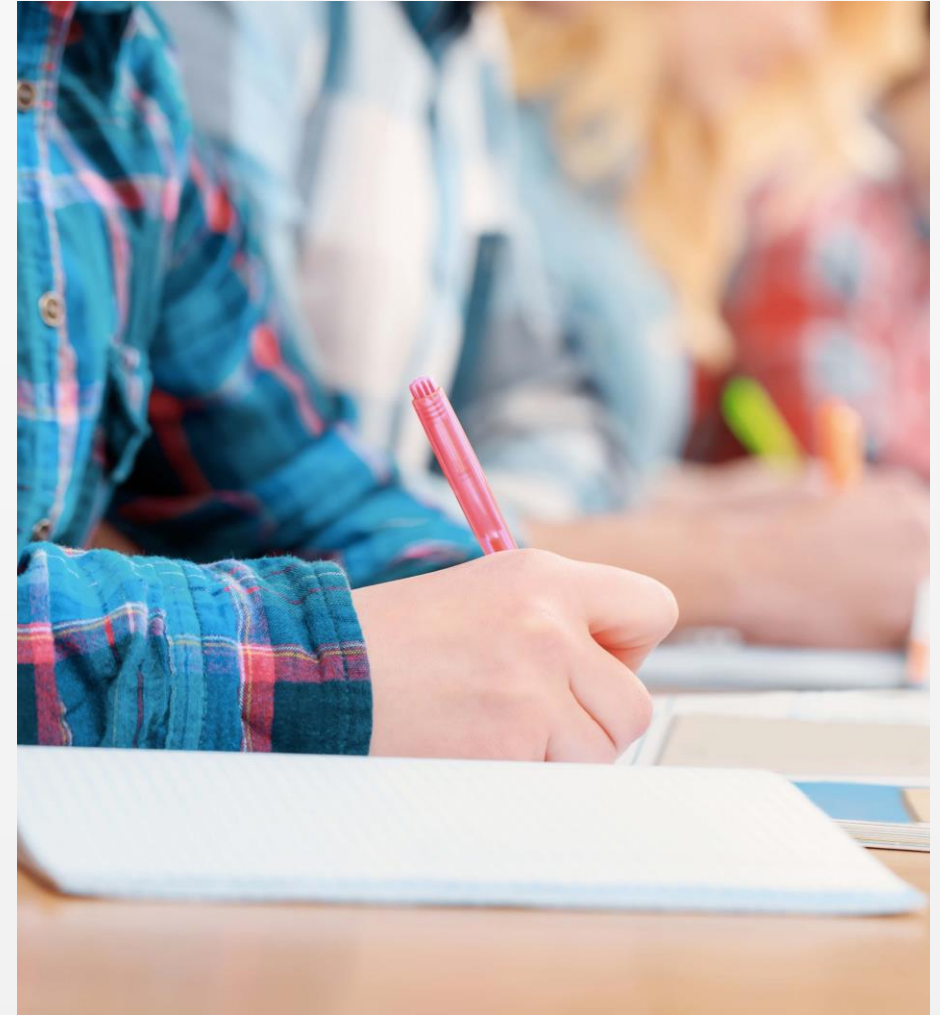
- Provide club meeting information and attendance
- Provide service project/fundraising data
- Provide partnership data
- Answer annual administrative questions
- Provide donation/giving data
- Share monthly reports with other individuals



# Member Information

**Club secretaries can update membership data in the following way:**

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







# Connect with Kiwanis Advisors (Builders Club & Key Club)



## Gather information from Kiwanis advisors:

- Number of members in the sponsoring club.
- Updated faculty advisor information. (Name, email, phone, address.)



# Updating Kiwanis Advisors

The Secretary Dashboard is open August 1 – 31

1. Log into the Kiwanis Connect reporting site at [www.kiwanis.org/login](http://www.kiwanis.org/login).
2. Select the secretary dashboard icon from the menu on the left side of the screen. Scroll down to the Sponsorships section and select the pencil icon next to the K-Kids/Builders Club that the club sponsors.
3. Update club information. Confirm or update the membership count.
4. Update the mailing address. Verify or update the mailing address (include the attention address line) to which the membership kit should be shipped. If a mailing address is not updated, the kit will be mailed to the Kiwanis club secretary.
5. Repeat steps 2 – 4 for each K-Kids/Builders Club that the club sponsors.

# Finances



**Club secretaries can access financial data in the following ways:**

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



# Required forms

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





# Optional submissions

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



# Important Dates

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



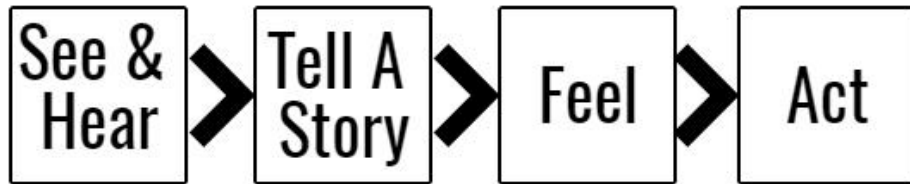
# Case Studies



# Scenarios

## INITIAL CONVERSATION

*Gut reaction*



**GIVE YOURSELF SOME TIME**

*"Let me give this a little more thought."*

## FOLLOW-UP CONVERSATION

*Thinking outside the box*





# Scenario 1

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



# Scenario 1- Potential Solution

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



# Scenario 2

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



# Scenario 2 - Potential Solution

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





# Closing activities



- Questions?
- Online evaluations
- Attendance credit
- Contact information

