

Kiwanis

Kentucky-Tennessee District

Serving the Children of the World™

Club Leadership Education

2010-2011 Secretary Training

Based on training prepared by Cal-Nev-Ha District



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Agenda

- Secretary's Dashboard
 - KiwanisONE Monthly Reports
 - Kiwanis Membership Information
 - Annual Reports
- Graduated New Member Fees
- Dues Billing & Changes
- Legal Considerations
- Risk Management
- Club Finances
- Records Retention
- Resources
- Q & A



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Important Reminders

- President or Secretary change? Use the Online Reporting Tool
- President or Secretary email address change? Update roster online



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The Monthly Report

- Filed online
- Collects annual report information
- **Required** to collect information for the Distinguished Club Award
- Due by the 10th of each month



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KiwanisONE Online Reporting System – FAQ's

- Where do I go to log in?
 - www.kiwanisone.org/login
- I have forgotten my password – what do I do?
 - Reset it at www.kiwanisone.org/login



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KiwanisONE Online Reporting System – FAQ's

- **Where can I get training?**
 - Access online training videos at:
<http://www.kiwanisone.org/Reporting>
- **Can I amend a submitted report?**
 - Yes. From the Report Launch page click either Part 1 or 2
 - Make your changes and save the section(s)
 - On the Report Launch page, click the “Submit” button



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Membership Information Form

- **One Form To :**
 - Add
 - Delete
 - Transfer
 - Member Information Change (except name)
 - Honorary Member
 - Non-Member Magazine Subscription (paper only)





KIWANIS MEMBERSHIP INFORMATION

PLEASE TYPE OR PRINT

KIWANIS CLUB	KEY NUMBER	DISTRICT NAME OR NUMBER	STATE/PROVINCE	DATE
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PLEASE CHECK ONE

- NEW OR FORMER MEMBER ADD MEMBER DELETE MEMBER TRANSFER
 MEMBER INFORMATION CHANGE HONORARY MEMBERSHIP NON-MEMBER SUBSCRIPTION

MEMBERSHIP ID NUMBER	KIWANIS LIFE MEMBER YES NO	KIWANIS LIFE MEMBER NUMBER	DISTRICT LIFE MEMBERSHIP YES NO
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MULTIPLE MEMBERSHIP YES NO	IF YES, CLUB NAME	KEY NUMBER	MEMBER ID NUMBER	DATE JOINED (MONTH/DAY/YEAR)
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LAST NAME	SUFFIX	FIRST NAME	MIDDLE INITIAL	PREFIX
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GENDER M F	DATE OF BIRTH	HOME PHONE	PREFERRED EMAIL ADDRESS
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HOME ADDRESS	CITY	STATE/PROVINCE	COUNTRY	ZIP/POSTAL CODE
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BUSINESS NAME	TITLE/POSITION	BUSINESS ADDRESS
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CITY	STATE/PROVINCE	COUNTRY	ZIP/POSTAL CODE	FAX NUMBER	BUSINESS PHONE
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SPOUSE NAME	IS SPOUSE A MEMBER YES NO	IF YES, CLUB NAME	KEY NUMBER	MEMBER ID NUMBER
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SEND KIWANIS MAIL TO: <input type="checkbox"/> HOME <input type="checkbox"/> WORK	SPOUSAL MAGAZINE CREDIT YES NO
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CHECK ONE BLOCK PER CATEGORY

PRIMARY EMPLOYMENT Codes

- | | | | |
|---|---|--|---|
| <input type="checkbox"/> 1 Banking/Finance | <input type="checkbox"/> 11 Legal | <input type="checkbox"/> 21 Real Estate | <input type="checkbox"/> 31 Agriculture |
| <input type="checkbox"/> 3 Communications/Media | <input type="checkbox"/> 13 Manufacturing (Heavy) | <input type="checkbox"/> 23 Religion | <input type="checkbox"/> 94 Other _____ |
| <input type="checkbox"/> 5 Construction | <input type="checkbox"/> 15 Manufacturing (Light) | <input type="checkbox"/> 25 Retail | |
| <input type="checkbox"/> 7 Education | <input type="checkbox"/> 17 Medical | <input type="checkbox"/> 27 Transportation | |
| <input type="checkbox"/> 9 Government | <input type="checkbox"/> 19 Nonprofit | <input type="checkbox"/> 29 Wholesale | |

JOB CLASSIFICATION Codes

- | | |
|--|--|
| <input type="checkbox"/> N Elected | <input type="checkbox"/> S Supervision |
| <input type="checkbox"/> O Management | <input type="checkbox"/> T Technical |
| <input type="checkbox"/> P Partner/Owner | <input type="checkbox"/> V Retired |
| <input type="checkbox"/> Q Professional | <input type="checkbox"/> X Other _____ |
| <input type="checkbox"/> R Sales | |

EDUCATION ATTAINED Codes

- | | |
|---|---|
| <input type="checkbox"/> A Grade School | <input type="checkbox"/> F Master's Degree |
| <input type="checkbox"/> B High School | <input type="checkbox"/> G Graduate Professional Degree |
| <input type="checkbox"/> C Technical/Business School | |
| <input type="checkbox"/> D Associate Degree (2 yrs) | |
| <input type="checkbox"/> E Baccalaureate Degree (4 yrs) | |

College/University Attended _____ Other Affiliations _____

Offices/Positions Held (if any) _____

PLEASE NOTE: FOR MEMBERSHIP STATISTICS ONLY. KIWANIS INTERNATIONAL DOES NOT PROVIDE MEMBERSHIP INFORMATION TO THIRD PARTIES.

If you are a former member Kiwanis Key Club Kiwanis Junior Circle K Aktion Club K-Kids Builders Club

Club Name _____ Former ID Number _____

Date Joined _____ Date Left _____

PLEASE COMPLETE THIS SECTION ONLY IF DELETING A MEMBER

Effective date (MM/DD/YYYY) _____

Check reason for delete - Codes

- | | | | |
|---------------------------------------|--|---|--|
| <input type="checkbox"/> A Attendance | <input type="checkbox"/> B Business Pressure | <input type="checkbox"/> D Deceased | <input type="checkbox"/> G Other _____ |
| <input type="checkbox"/> H Health | <input type="checkbox"/> I Lack of interest | <input type="checkbox"/> L Lack of time | <input type="checkbox"/> M Moving |
| | | | <input type="checkbox"/> P Non payment of dues |

PLEASE COMPLETE THIS SECTION ONLY IF MEMBER IS TRANSFERRING TO ANOTHER KIWANIS CLUB

Effective Date (MM/DD/YYYY) _____ Dues paid through _____ (Date)

Club transferring to - Club Name _____ Key Number _____ District _____

NOTE: PLEASE GIVE ONE COPY OF THIS FORM TO MEMBER TO BE GIVEN TO THE CLUB TO WHICH HE OR SHE IS TRANSFERRING.

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What's New?

- **Member management for Club Secretaries**
 - Online member adds
 - Online member deletes
 - Online membership information changes
 - **For Honorary Member :**
 - Check only the “Honorary Membership” block
 - Complete personal information
 - Submit to Kiwanis International (\$8.00 fee)





- Secretary
- Secretary Dashboard
- Member Management (KI)**
- Monthly Reports
- Club Election/Change in Officers
- Meeting Location
- View Member List from KI
- Club Excellence Tool Admin
- Update My Information

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

Member Management

IMPORTANT! Any changes made here are reflected in real-time with Kiwanis International. If you encounter any issues please send an email to kiwanisone@kiwanis.org and include your name, club, and a detailed description of the problem you are having.

<p>Search to generate a club member list</p> <p>Filter your search results and generate a club member list. Make edits or deletions. Export to an Excel spreadsheet.</p> <p>Select Division: <input type="text" value="Division 15"/></p> <p>Select Club: <input type="text" value="South Denver"/></p> <p>Member Type: <input type="text" value="All Members"/></p> <p>Include these options in list results:</p> <p><input checked="" type="radio"/> Active <input type="radio"/> Former <input type="radio"/> Deceased</p> <p><input type="button" value="Search"/> <input type="button" value="Start over"/></p>	<p>Search for an individual member</p> <p>Input search values in one or more fields. Identify correct member. Make edits or deletions. Export to an Excel spreadsheet.</p> <p>Member ID: <input type="text"/></p> <p>First Name: <input type="text"/></p> <p>Last Name: <input type="text"/></p> <p><input type="button" value="Search"/> <input type="button" value="Start over"/></p>
<p>Add a new member</p> <p>This feature is for adding new members to your club.</p> <p><input type="button" value="+Add New Member"/></p> <p>Invoice page >></p>	

Secretary

Secretary Dashboard

Member Management (KI)

Monthly Reports

Club Election/Change in Officers

Meeting Location

View Member List from KI

Club Excellence Tool Admin

Update My Information

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

Member Management



IMPORTANT! Any changes made here are reflected in real-time with Kiwanis International. The BETA tag will be here for a four weeks while we work out any kinks. If you encounter any issues please send an email to kiwanisone@kiwanis.org and include your name, club, and a detailed description of the problem you are having.

[Back](#)[Export to Excel](#)

Search Criteria

Division: Division 15
Club: South Denver (K03952)
Member Type: All Members
Member Status: Active

Excel export should include:

- Members with bad address
 Members birth dates

Search Results

Member ID	Title	Last Name	First Name	Suffix	Edit	Delete
000000168680		Adsit	Russell		Edit	Delete
000002990727		Anderson	Ken		Edit	Delete
000000528531		Benton	A		Edit	Delete
000002121495		Bradley	Kenward		Edit	Delete

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What's New?

- **Kiwanis International Graduated New Member Fees**
 - In effect April 1, 2010
- **Kentucky-Tennessee Graduated New Member Fees**
 - In effect April 1, 2010
- **All fees are paid through Kiwanis International**



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Member Add Month:	KI Dues, Mag, Ins	K-T New Member Add
October	\$ 62.00	20.00
November	\$ 62.00	20.00
December	\$ 60.00	20.00
January	\$ 54.00	15.00
February	\$ 48.00	15.00
March	\$ 42.00	15.00
April	\$ 36.00	10.00
May	\$ 30.00	10.00
June	\$ 24.00	10.00
July	\$ 18.00	5.00
August	\$ 12.00	5.00
September	\$ 6.00	5.00



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Membership Billing

- **Annual Billing**
 - Based on club's September 30th membership
 - Current roster mailed week of August 23rd
- **Update as required – online**
 - Adds and deletes by September 30th to change billing
- **Return to KI by due date (paper)**
 - Invoice based on updated roster/online adds & deletes



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What's New?

- **2010-2011 Kiwanis dues**
 - All billings based on Sept. 30, 2010 membership
- **Payment due dates for 2010-2011**
 - Billing group 1 – November 30, 2010
 - Billing group 2 – January 31, 2011
 - Billing group 3 – March 31, 2011
- **Payment due dates will change for 2011-2012**
 - All billings – November 30, 2011
- **Online annual billing to come...**



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Annual Reports

- **Annual Club Report (electronic only)**
 - Clubs using KiwanisOne do NOT file
 - Available at www.kiwanis.org mid-September
 - Due November 15th
 - Membership is determined by the dues roster
- **Report of Club Elections**
 - Due June 1st
 - Submit online through KiwanisOne or download





- Home ▶
- Calendar ▶
- Member ▶
- Events ▶
- Meetings ▶
- Committees ▶
- Projects ▶
- Newsletter ▶
- Communications ▶
- Secretary ▼**
- Members Admin
- Meeting Admin
- Attendance Report
- Committee Reports
- Monthly Reports
- Club Election**
- Set Officers
- Meeting Location
- Member Information
- View Member List from KI
- Administration ▶

Club Election Report

This Annual Report of Club Election form is used to report the results of your club's elections of **officers for the 2008-09 administrative year**, which are held at your club's annual meeting.

You will fill out each position by clicking the 'Add Member' under Edit (far right). Once you do this for each position and the report is complete, click the 'Submit' button at the bottom.

IMPORTANT! If you fill this form out you **DO NOT** need to fill out a paper version and mail it to Kiwanis. This is the official report.

- Submitted:
- Resubmitted:

Position	Member Name	Member ID	Edit
President			Add Member
President-Elect			Add Member
Secretary			Add Member
Treasurer			Add Member
Membership/Growth Committee Chair			Add Member
Membership/Growth Committee Chair			Add Member
Club PR & Marketing Chair			Add Member
Club PR & Marketing Chair			Add Member

I understand this information will be going into the Kiwanis and district directory

Submit Report

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Legal Considerations

- **Clubs must be incorporated**
 - Avoids personal liability on the part of club members
- **Secretaries should check corporate status**
 - KY - [http://apps.sos.ky.gov/business/obdb/\(S\(34angb55bbeyv45ui1oaien\)\)/Default.aspx](http://apps.sos.ky.gov/business/obdb/(S(34angb55bbeyv45ui1oaien))/Default.aspx)
 - TN - <http://tnbear.tn.gov/Ecommerce/FilingSearch.aspx>
 - GA - <http://corp.sos.state.ga.us/corp/soskb/csearch.asp>
 - VA - https://cisiweb.scc.virginia.gov/z_container.aspx



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Legal Considerations

- “Suspended” clubs must be revived
 - File Past Due Documents
 - File Application for Certificate of Revivor
- Sign contracts **ONLY** with approval of Club Board of Directors (*i.e. Installation Dinner at Hotel or Restaurant*)



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Risk Management

- Review the Risk Management Packet
- Verify your Club has Directors & Officers Insurance
- Is your treasurer bonded?
- Use caution if planning an event involving liquor!



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Risk Management

- **Have a Club Safety Coordinator**
- **Coverage questions call Charles Ridenour 423-337-6833 (Home), 423-337-6123 (Work) or the Hylant Group (800) 442-7475 x 5121**
- **All general liability premiums (the part in dues) may come from the service account**



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Club Finances

- **Maintain Two Accounts**
 - **Administrative**
 - **Project, (service, benefit, etc.)**

IRS 501(c)(3) Status for Clubs

- **IRS Approval? Denied for Kiwanis Clubs!**
- **Possible Alternative is a Club Foundation**



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501(c)(3) Club Foundations

- May replace a club's service account (if approved by IRS)
- Contributions tax deductible
- Corporate & government sponsors
- IRS Approval? Application needed



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Tax Issues

- **ALL Kiwanis Clubs Must File a Form 990**
- **Form 990-N (Electronic) if <\$25,000 gross receipts**
 - Due February 15
- **All Kiwanis Clubs Must Have an EIN & Report EIN to Kiwanis International**
- **Same Rules for Key Clubs & Circle K Clubs - unless Funds are Controlled by the School**



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Records Retention

- **Comply with State laws**
- **Permanent records**
 - Official documents of incorporation
 - Minutes of board meetings
 - Financial reports (for 7 years)
 - Cancelled checks (for 7 years)
 - Items of historical significance



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Resources

- District Office 1-859-422-2256
- www.ktkiwanian.org
- Leadership Guide
- Lieutenant Governor
- Kiwanis International 1-800-Kiwanis x411
- www.kiwanisone.org

Thanks to Pete Horton, Cal-Nev-Ha Kiwanis District Secretary, for permission to use and modify this document

