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## RETURNING SECRETARY EDUCATION

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Dear participant:

Thank you for being a leader—and for participating in club secretary education. The information you receive during the session will help ensure your success as you begin or continue in your role as club secretary.

This workbook will be a crucial companion throughout the course and your year as club secretary. It’s your guide to information about the online technology that you’ll use regularly as well as lists of due dates to help you keep track.

A successful experience with club leadership education is an important first step toward a successful experience as a club leader. So plan to spend some time with this workbook and refer to it throughout your year of service.

Thank you for being an important part of Kiwanis’ success in your community and around the world.
Getting started

You are not alone—you’re a member of a leadership team. Every year brings a transition for all leadership positions—from Kiwanis club officers to the president of Kiwanis International. You are serving with 7,500 other club secretaries, 7,500 club presidents, 750 lieutenant governors, 50 governors and 20 board members, including the organization’s president. Together, we’re going to help the Kiwanis family make a difference all over the world. Next year is going to be a great year, and we’re excited that you’ve made the commitment to be a part of it.

NEW SECRETARIES:

Our objective for the session is very simple: to introduce you to the online tools and additional resources available to make the club secretary job simpler.

We’ll focus on these three topics during this session:

- Online reporting and tools
- Required forms
- Important dates

How will we know if we’ve accomplished the goal? By measuring your:

- Usage of the online club management system
- Submission of your club’s scheduled reports

RETURNING SECRETARIES:

Our objective for the session is very simple: to share new features in the club management system, new information from Kiwanis International and your district, and best practices for using the system.
Job description

As a club secretary, you’ll use many of the club management features on KiwanisOne.org. This is where you’ll find the Secretary Dashboard, complete your club’s monthly report form and adjust your club roster. Please note that every feature you see is available to all clubs.

Terms to know

Before we dive in, let’s become familiar with the online tools you’ll be using. You’ll see these terms used in screen shots later in this session.

**Member Login tab:** Use this tab to move from KiwanisOne.org to the password-protected reporting and club management tools. On KiwanisOne.org, you’ll select the Member Login tab to reach the Kiwanis Connect login screen.

**Kiwanis Connect:** This is the login screen for KiwanisOne.org. It’s password protected, and access is limited to certain club officer positions, such as club secretary.

**Club management system:** After entering your secretary login in the Kiwanis Connect screen, you’ll reach the club management system, which includes all the tools for updating club and member information as well as compiling monthly reports online.

**Secretary Dashboard:** As a club secretary, you have a special icon in your menu bar to access the Secretary Dashboard. This page displays club and meeting information, announcements and links to the club secretary’s most commonly used resources.

**Member Admin:** Use this tab on the Secretary Dashboard to access and update your club roster.

**Annual Report:** Use this tab on the Secretary Dashboard to fill out and submit the annual club report by November 15th every year. (If you submit every monthly report, this is completed automatically for your club.)

**Finances:** Use this tab to manage your club’s financial obligations with dues, fees and retail orders.

**Monthly Report:** Use this tab on the Secretary Dashboard to fill out and submit a monthly report of club activities and successes by the 10th of every month.

**Portalbuzz:** Portalbuzz is a subscription service available to Kiwanis clubs that want added features for their club management system. This will allow you to access an expanded menu of club management tools. Any club can test drive the tools via the hands-on demo on the www.portalbuzz.com website.
Kiwanis online reporting

The online reporting platform allows club secretaries to streamline administrative tasks for the club, district and Kiwanis International.

Here are some of the benefits you’ll enjoy by using it.

- Submit nearly everything directly from your computer—no paper forms to mail, no postage to purchase.
- Add and save information for the monthly report as it occurs.
- Submit your monthly and annual reports easily.
- Edit information in prior months’ reports easily.
- Look back at previous reports at any time.
- Compile monthly reports into a comprehensive year-end report.
- Send reports to club leaders, your district leadership team, Kiwanis International and others you include on your email list automatically.
- Update your club roster in real time by adding new members, deleting members and updating current member information. Data is synced with Kiwanis International’s records.
- Give districts access to up-to-date information about club membership trends, websites, and meeting time, days and locations.
- Update club information that’s shared with potential new members via the Find a Club locator map on Kiwanis.org and in the printed annual directory.
- Report your club elections results to immediately give those members access to resources.
- See your club’s Service Leadership Programs, their current status, and the confirmation that background checks have been completed for those members involved with those programs.
- Manage your club’s financial commitments with dues, fees and retail purchases and make payments online.

Currently certain areas of online reporting are available in English, French, Dutch, Norwegian, Icelandic, Japanese, Mandarin, and Spanish and are being used in North America, Australia, New Zealand-South Pacific, Philippine Luzon and Malaysia.
LOGIN

Here's where you'll log in to the KiwanisOne club management system. If you have any trouble logging in, there are instructions for resetting your password or accessing help.

Tip: The email used to access your member account must be unique to you and cannot be shared with another member.

Hint: Bookmark www.KiwanisOne.org/login for your convenience!
Next, use the drop-down menu to choose the position you’re representing during this online visit and click Login.

For your role as club secretary, choose the option that includes your club name. This will give you access to the KiwanisOne club management system. (You may be serving in other positions within your club or district, such as a Service Leadership Program advisor or a certified instructor. If so, those positions will be options in the drop-down menu, and the website will have features specifically for those positions.)

On October 1, the KiwanisOne club management system will update to show that you’re the club secretary and will allow you access to the secretary section. Prior to October 1, you won’t have access to this information.
To get to the Secretary Dashboard and other secretary functions, click the Secretary Dashboard icon.

If you don’t see the Secretary Dashboard icon, your member record may not show that you’re the current club secretary. There are a few ways to fix this.

1. Ask the current secretary or president to update the officers list in the KiwanisOne club management system. Once you have assumed the office of secretary on October 1, you will have access to the Secretary Dashboard.

2. Email the member services department (memberservices@kiwanis.org) at Kiwanis International with the correct officer information.

3. If you prefer, call member services at +1-317-875-8755, ext. 411. The member services team will ask you to confirm your role in writing, and a team member can walk you through the online process over the phone.
Once you've clicked on the Secretary Dashboard icon, you'll go to the Secretary Dashboard. You'll see your club's ranking in your district for net growth and percentage growth for the Kiwanis year.

At the top of the page, you'll see five options:

- **Sec. Dashboard**: This selection appears in color because that’s the page you’re currently viewing.
- **Member Admin**: Access member records and add new members.
- **Monthly Report**: File your updates online.
- **Annual Report**: File and/or review club annual reports online.
- **Finances**: View all open (unpaid) orders and print invoices.
The club officers are listed next on the page. If your club encounters a change of officer mid-year, update club officer information using the plus sign to add and the trash can icon to delete.
If you look to the right of your club officer roster, you’ll notice that your charter date and division and district number are listed at the top of the column. Immediately below this information you’ll find the meeting location, day, time and club website are listed. Because this information is published in the Find a Club locator map on Kiwanis.org and in the annual club directory, it’s important to keep your club’s contact information updated. And it helps potential, current and visiting members find you.

Fun fact: The Find a Club locator map on Kiwanis.org garners about 5,000 queries every year from people looking for Kiwanis clubs around the world.
Lower on the Secretary Dashboard page, you will see a link specific to the Youth Protection Guidelines training. It is a requirement for the club to participate in this training once a year. This check box is your way of indicating that the club has completed this requirement.

Under Sponsorships, you’ll see any Service Leadership Program(s) you officially sponsor listed. Notice the dot next to the school name. A green dot indicates that the club is in good standing. A red dot indicates that a club may not be in good standing or maybe its charter has been revoked. If you see a red dot and think that it should be green, call the member services team at the Kiwanis International Office. They can help.

Also within the Sponsorships area, you’ll notice the words “Background check” under the club advisor’s name. In accordance with the Youth Protection Guidelines, a club advisor should have a clear background check. By checking the box, you are indicating that this advisor has completed this requirement.

Use the Support section to submit questions to the Kiwanis International Office or your district office. Select the best option from the drop-down menu under Send message to: and type your question in the message box. Don’t forget to hit Submit when you’re done.
To update the meeting location, day, time and website, start at the Secretary Dashboard.

Tip: Make a good first impression on potential members: Be sure the information on your club's website is current.
As you can see, the club in our example meets every Tuesday.

If your club doesn’t have a meeting location, day and/or time listed, click the plus sign \( + \) next to Add location. If you want to update information, click the pencil icon \( \text{✏️} \).

Remember: The Secretary Dashboard is the starting point to access all of the reporting functions.
DAY

For meeting frequency, you have two options. If your club meets every week, you’ll use the Day option. Check the box to the left and, using the drop-down menu, select the day of the week your club meets.

If your club doesn’t meet every week, choose the second option. For example, if your club meets the second and fourth week of each month, you would select the check boxes before the 2nd and 4th and then, using the drop-down box, select the day of the week the club meets.
TIME

When adding a meeting start time, notice that there are two sets of hourly numbers. The top half is for a.m. hours and the bottom half is for p.m. hours. For example, if your meeting starts at 6 p.m., click on “06” in the lower half of the “Hour” numbers, and click on “00” in the “Minute” numbers.

PLACE

For meeting location, enter the name of the location, which is required, as well as the full address. (Although the full street address isn’t required, an exact location makes your meeting easier to find for prospective members, speakers and those visiting for an interclub meeting.)

Finish the address and hit Save.

Note: The “Official City” was determined when your club first chartered. If you need to make a change to this field, please contact the Kiwanis International member services team.

Tip: Map the address in Google Maps or MapQuest to make sure it’s correctly marked.
WEBSITE

You can also edit the club website address from the Secretary Dashboard. Click the pencil icon to edit this field.
Member information

During your year of service, we anticipate your club will thrive and add new members, so you’ll need to become familiar with the process of adding new members to your club roster. From the Secretary Dashboard, select the Member Admin tab.

From the Member Management page, you can add, edit or delete members, as well as print a member directory. If you have questions as you navigate through these online resources, use the Help button at the top. It will take you to a knowledge database that includes short help articles and answers common questions.

Tip: Update your member roster quarterly.
EDIT

Phone numbers, addresses and email addresses change. Keeping member records updated ensures that communications and publications reach all members in a timely manner. Have members check their contact information every October, then do periodic checks every three months—so that’s October, January, April and July.

To edit member information, use the icon options that appear to the right of the member’s name, member ID and email address.

🔍 Click the magnifying glass icon to view the member’s current information.

✏️ Click the pencil icon to edit the member’s information.

🗑️ Click the trash can icon to delete a member from the roster. (We’ll talk more about that option later.)
On the Edit screen, you can't change a member's name or the club name—those are functions that can only be changed at the Kiwanis International Office. To edit a member's name, email memberservices@kiwanis.org with your club's name, the member's previous name and new name, and his or her member ID. (Don't worry about committing this to memory—this reminder is always at the top of this page.)

You can add a photo of a member—this is a new feature—which will also allow you to compile a member directory.

Select the check boxes for the areas you'd like to review or edit. Uncheck the boxes to collapse those text areas.
This is the middle of the page—you’ll see in this screen shot, the Business Address section is expanded but the Seasonal Address section is collapsed.
Complete your edits, then—and **this is important**—scroll all the way to the bottom of the page and click Save. Your updates will be added to the Kiwanis member database and shared with your district office as well. If you don’t want to save this entry and want to go back to the club roster, click **Back to list**.
ADD

To add a new member, on the Member Management page, click the New Member plus sign in the upper right.
In the Add screen, your club name, district, key number and division information will automatically populate. Fill in names and member type and click Continue.
If a new member is also a former member, the system will recognize that the name matches or nearly matches a name already in the member database. It will display those names that may be the new member.

If one of the listed names is the person to be added, then you must select **Add To Club** at the right of that name.

If none of the names listed is the actual person to be added, then you must select the **No Match Found** button. Selection of this button will take you to the next screen where additional information may be entered for that new member.
If a new member's name is not found in the member database, this is the next step to add him/her to your club roster.

Fill in all the available information. Include an email address to ensure that member communications are received.
Secretary dashboard

Home address
Business Address
Seasonal address
Contact Information
Primary email

Preferred phone
Select

Twitter

Google+

LinkedIn

Preferred address
Home

Web address

Facebook

Pinterest

Home phone
Work phone
Mobile phone
Fax

Education & Professional
Company name

Degree attained
Select

Primary employment
Select

Classification
Select

Job title

Profession

School attended

WWW.KIWANISONE.ORG  CLUB SECRETARY WORKBOOK 28
Again, don’t forget to click **Save** when you are finished so the information will be saved and submitted to Kiwanis International. When you submit a new member, the system will create an invoice that you can then print. This is referred to in the Finances section.
DELETE

When you need to delete a member for any reason, access your roster of members and click on the trash can icon to the right of the member’s name. This will delete the member from your club roster.
Once you’ve clicked the trash can icon, another dialogue box will appear. Choose the best reason for the member leaving the club and click **Delete**. The deletion will be submitted to Kiwanis International and your district.
Monthly reports

Back at the Secretary Dashboard, the next option in the tab menu is the Monthly Report.

Features and questions in the monthly report adjust every month. To see a current tutorial about how to complete the monthly report, please visit www.kiwanis.org/reporting.
The fourth tab is where you complete the annual club report. This information helps provide a snapshot of your club's activities for the year. Not only does this data provide your district with information to recognize your club's accomplishments, it also gives Kiwanis International an understanding of what our clubs are doing in communities around the world.

**Tip:** If a monthly report is submitted each month, the annual club report is automatically generated.
The final option in the tab menu is **Finances**.

The **Finances**, or “Open Orders,” page allows you to view any open (unpaid) orders and gives you two options for paying.

You may print invoices for these orders so that payment may be mailed to Kiwanis International, or you may pay online by credit card.

Clicking on the **Finances** tab will bring you to the **Open Orders** page.
In the example, this club has no open orders.
If your club has open orders, you will see a page similar to the screen you see here. Click the box to the left of the invoice you want to print or click “Check all” to print all invoices. Then click the “Print Invoice and Pay by Mail” button.

This will generate a PDF of the invoice or invoices which you may print.

The invoice contains the mailing information as well as details about the order and contact information for the appropriate department at Kiwanis International.

Send a copy of the printed invoice along with payment to the address listed on the invoice.

You may also click “Pay Online by Credit Card.” This will walk you through the process to submit payment electronically.
As you may be aware, in February 2013, the Kiwanis International Board released a new version of the Standard Form for Club Bylaws. This new version offers:

- Greater flexibility and autonomy to clubs
- Fewer restrictions
- Simplified language
- Greater global applicability
- More relevance to both traditional and nontraditional clubs
- Personalization of some club policies

Clubs are asked to adopt the new bylaws by the end of the 2013–14 administrative year (September 30, 2014).

The new Standard Form for Club Bylaws is available for online submission by the club secretary or club president. Let’s go over some of the very important information. Everything’s also listed online in step-by-step instructions in case you forget anything.

To access the club bylaws, log in to KiwanisOne club management or go through the KiwanisOne website at www.kiwanis.org/newclubbylaws. Here we access the bylaws through the club management system.
Once you've logged in, you'll see the Welcome screen. Click on **Club Bylaws** in the left menu.
In the Club Bylaws Management Center, there are four easy steps to updating your club bylaws. Each time you complete a step and hit **Save** at the bottom of each page, you’ll come back to this dashboard. However, once each step is completed, the boxes next to each step will contain a black check mark.

Because things have changed when updating and adopting the new Standard Form for Club Bylaws, you’ll want to read the Bylaws and policies FAQ document to understand the process before you get started. Download the Blank bylaws and policies template. It’ll guide you and the club members through the variables that can be personalized for your club. Fill in blanks electronically to keep track for your club’s personal use during those discussions. To see the saved edits, use the “Bylaws and policies edits in progress” document. Once there’s agreement and approval from the club members, submit the final club bylaws by completing the steps online.

The PDF document “Blank bylaws and policies template” is a resource to help determine which variables best suit your club. Submit the final club-approved bylaws using the online form.
Let’s start with Step 1: Review instructions and Standard Form. Click Review to begin this process.

**Instructions for adopting the new Standard Form for Club Bylaws**

The Standard Form for Club Bylaws states each club’s agreement with Kiwanis International on basic standards to belong to the organization and to use the Kiwanis names and marks. In October 2012, the Kiwanis International Board adopted a new Standard Form for Club Bylaws that provides greater flexibility and autonomy to clubs.

All clubs are asked to adopt the new Standard Form for Club Bylaws preferably during the 2012–13 administrative year, but definitely no later than the end of the 2013–14 administrative year (September 30, 2014).

The new club bylaws cannot be edited, but it includes two separate sections on club policies, both customizable. Many clubs have never had formal policies—but they should. Bylaws and policies complement each other, working together as a whole.

- Mandatory policies carry out basic provisions of the club bylaws.
- Optional policies cover things clubs should consider but are not required to adopt

**INSTRUCTIONS:**

1. The club board initially determines the policy information to recommend to the club membership, and the club secretary or president adds that information to the online form.
2. That information will be retained online for 90 days. If the information is not submitted within 90 days, the club will have to complete the form again. Edits may be made prior to submission.
3. The board must provide at least 14 days’ advance notice to club members that the new bylaws will be considered at a particular meeting. A quorum (one-third of the members) must be present at that meeting for action to be legitimate.
4. The board presents the complete recommended bylaws and policies package to the members. These are either accepted as presented or changed during the meeting. A two-thirds vote of the members present at that meeting is required to adopt the new club bylaws.
5. The club secretary or president verifies or updates the information that was entered previously so it agrees with what was adopted by the club membership, then submits the final version of your club’s bylaws online.
6. Your club will be notified when its new bylaws have been approved. Please allow up to six weeks after submission.
7. If your club needs to adjust its policies before submission but before approval by Kiwanis International, you may choose the ‘unsubmit’ option, edit the text as necessary, then rere-submit.
8. The club’s bylaws and policies can be accessed here anytime in pending or approved form. Your club’s bylaws or policies may be amended later as needed, via the same process outlined in these Instructions.

If you need assistance, contact Rene Keller, Club Processing Representative, at clubbylaws@kiwanis.org or by phone at 1-800-949-2567 (toll-free in U.S. and Canada) or 317-875-8735 (all other areas), extension 203.

Download the Standard Form for Club Bylaws

Finished

Questions? Contact clubbylaws@kiwanis.org. For technical issues, report the problem.

Once you’ve read through all the instructions, click Finished to move to Step 2. If you don’t click Finished, the system won’t recognize that you’ve completed Step 1.
Clicking on Finished will bring you back to the Club Bylaws Management Center screen with a check mark next to Step 1, indicating its completion. Next, click on Customize in Step 2 to begin customizing your club's mandatory club policies.
Mandatory Club Policies

As stated in the club bylaws (Sec. 10.4) “The club membership shall consider and adopt the mandatory club policies required by Kiwanis International, which complete provisions stated in the bylaws. Adoption shall be by two-thirds (2/3) vote of the club members present and voting, provided at least fourteen (14) days previous notice is given to the club members.”

Policies AG must be considered, completed, and adopted by the club and submitted to Kiwanis International for approval with the club’s initial bylaws or whenever club bylaws or policy change are made, as they are part of the complete bylaws package.

* Required fields

A. CLUBS DUES AND FEES

Notes: Use this policy to state the current amount of dues and other fees (if any) for your club. (a) The dues and new member enrollment fee amounts should include the current Kiwanis International dues and fees and district/federation dues and fees. (b) If new members are alumni of service leadership programs, clubs should not charge them for Kiwanis International dues for two years after joining the club. (c) If the club has multiple additional fees, repeat line 3 and complete as appropriate.

Members will pay the following financial obligations to the club:

- **Currency**: USD
  - 
- **Annual dues amount**
  - 75
  - Must be a number. Do not enter dollar sign and do not use decimal places or commas.
- **New member enrollment fee amount**
  - 25
  - Note: If the enrollment fee is graduated or pro-rated, then state that, listing the minimum and maximum amounts. Example: "Graduated monthly, from $10 to $40."

Remember to fill in information for all required fields, which are marked with a red asterisk (*).
When you have completed all four steps, your final screen will say **Status: Pending approval**. Notice you can download a copy of the bylaws you’ve just submitted. And if you need to make changes while it’s pending approval, you can unsubmit the bylaws and start the editing process again.
Although some things are considered optional or recommended, a few documents are required by either Kiwanis International or your local government to protect your club charter.

**Required forms**

**Monthly report form:** Complete by the 10th of every month (i.e., October monthly report due on November 10).

**Annual membership roster:** Update online prior to October 10 so your club’s billing statement will be correct. Check your roster for updates quarterly.

**990, 990N or 990E-Z form (U.S. clubs only):** File with the IRS by February 15. The 990 form allows your club to maintain its tax exempt status. Get instructions and links at www.kiwanis.org/form990.

**Annual report of club elections:** Submit to the Kiwanis International Office electronically using the Secretary Dashboard by June 1. Refer to page 32B for more information.

**Optional submissions**

**Proposed amendments and resolutions to the Kiwanis International Bylaws:** Submit your proposal in writing to the Kiwanis International Office by February 15 for consideration in the House of Delegates.

**Delegate certification forms:** File a certification form by April 30 for delegates attending the Kiwanis International convention. Delegate certification forms for your district convention also have deadlines. Check with your district leaders or website.
BY DUE DATE

10th of every month: monthly report form due to the Kiwanis International Office

October 1: Your first day in office

October 1: Approval of club budget due

October 10: Updated club roster due

February 15: Deadline for U.S. clubs to submit the 990 tax form to the IRS

February 15: Deadline for any club to submit proposed amendments and resolutions to the Kiwanis International Bylaws to be presented at the next Kiwanis International convention

April 30: Delegate certification form for the next Kiwanis International convention due

June 1: Annual report of club election due

Monthly checklist

The months leading up to your taking office are a good time to get acclimated to the role of secretary. During this time, work in conjunction with the current club secretary to ensure a smooth transition from one officer to another. Consult the monthly task list in the Kiwanis Leadership guide available for download at www.kiwanis.org/clubsecretary.

Tip: Download and follow the monthly task list in the Kiwanis Leadership guide, available at www.kiwanis.org/clubsecretary.
District topics
Wrapping it up

Where to find more information

There are many places to find the information and resources you may need for support throughout the year. Some are materials, some are events—but almost all of them are just a few clicks away.

Club Leadership Education programs available at www.KiwanisOne.org/CLE
- Board member education (interactive)
- Committee education (interactive)
- New-member orientation (either interactive or downloadable)

Tip: Bookmark these KiwanisOne.org pages for quick reference this year:
www.kiwanis.org/CLE
www.kiwanis.org/clubsecretary
Events to remember

Kiwanis district conventions
- Member education opportunities
- Fellowship
- House of delegates
- Awards and recognition
- District elections

Kiwanis International convention
- Member education opportunities
- Fellowship
- House of Delegates
- Awards and recognition
- Kiwanis International elections

Kiwanis International convention schedule
- 2016: June 22–25  Toronto, Ontario, Canada
- 2017: July 13–16  Paris, France
- 2018: June 28–July 1  Las Vegas, Nevada
Is managing club tasks driving you nuts?

Make it easier with Portalbuzz. For service organizations, Portalbuzz is the best public-website and club-management system. You get simple tools for club tasks—such as event and meeting management, volunteer signup, billing and member directories. You get design templates for Kiwanis-club websites. Best of all, you get more time for the service and fellowship you love.

Come hear what the buzz is all about.
Try the demo or sign up for a free trial at www.portalbuzz.com.