

KIWANIS CLUB MONTHLY REPORT

User Guide

KIWANIS CLUB MONTHLY REPORT - MR

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Kiwaniis Club Monthly Reports (MR) are completed online each month by either the Kiwanis club secretary or president. This report provides Kiwanis International, the district, and the club with important data that will improve programming and educate volunteer leaders on the work and impact of our clubs and members in their communities. The information is also used to create a new Club Monthly Report Summary (CMRS) and District Monthly Report Summary (DMRS), which will be available to all club and district leaders from the Secretary Dashboard.

Each month's MR is due by the 10th of the following month. For example, the October report is due by November 10.

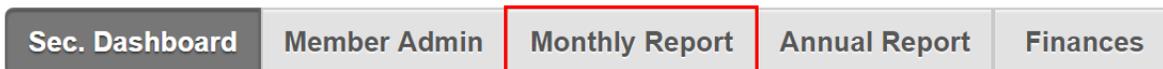
The MR can be accessed from the Monthly Report Launch Page found in the Club Secretary Dashboard.

Monthly Report Launch Page

1. Log in at <https://reporting.kiwanisone.org>
2. Click the Secretary Dashboard icon.



3. Click the Monthly Report tab near the top of the page.

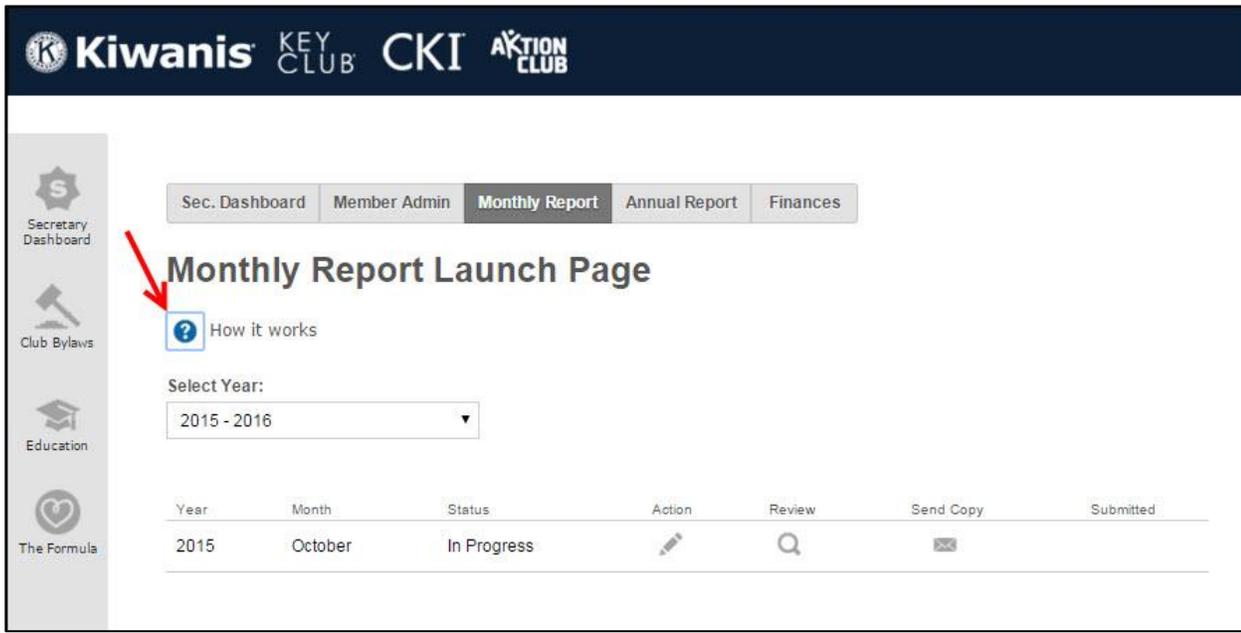


To learn more about the MR, click the information bubble  to read how the MR is organized.



NAVIGATING THE MONTHLY REPORT LAUNCH PAGE

The current Kiwanis year is shown by default. Each report will appear on the first day of the month, along with its status (Not Started, In Progress, or Submitted). After a report has been submitted, a green checkmark will appear at the end of the row.



Sec. Dashboard Member Admin **Monthly Report** Annual Report Finances

Monthly Report Launch Page

[How it works](#)

Select Year:
2015 - 2016

Year	Month	Status	Action	Review	Send Copy	Submitted
2015	October	In Progress				

How it works

We coach you step-by-step to help get your report done quickly and accurately.

You tell us about your club's achievements by answering simple questions, grouped together in these four areas:

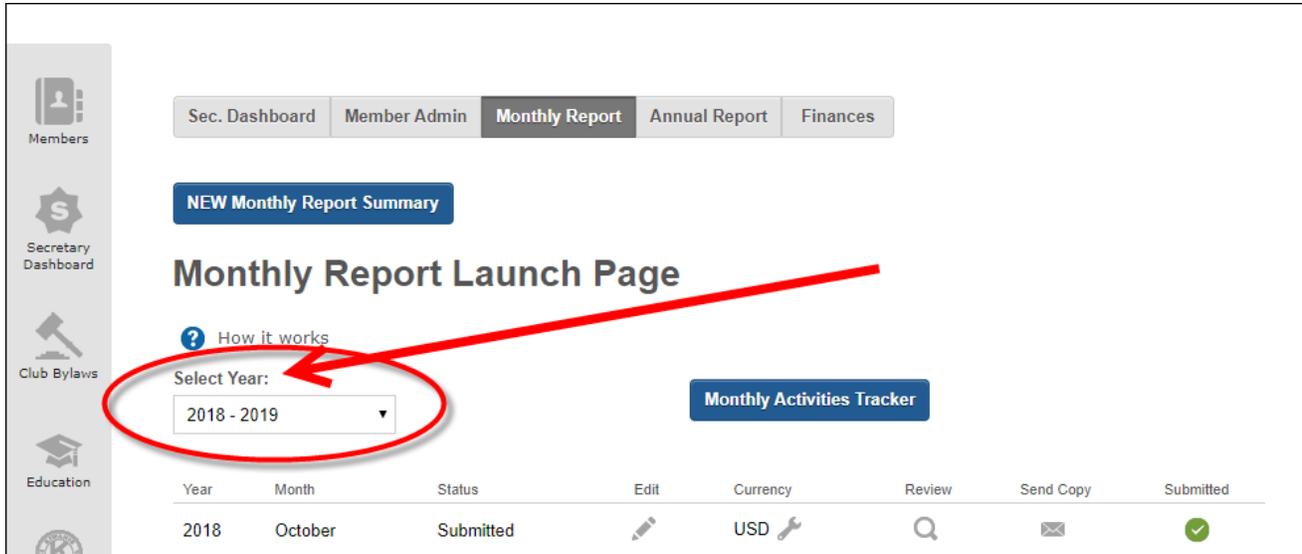
1. Inspiration and engagement
2. Meaningful service
3. Kiwanis image
4. Financial viability

If you submit all 12 monthly reports using this online system, we will import your data into the Annual Report for you in November.

Reports can be edited and resaved/re-submitted at any time in the fiscal year.
 Reports can be reviewed on-screen while in progress or after submission.
 Submitted reports can be shared with others via email as a PDF.

VIEWING PAST REPORTS

To see reports from previous years, click the Select Year box and click the desired year. You may not edit these reports, but you can click the magnifying glass icon to see the data.

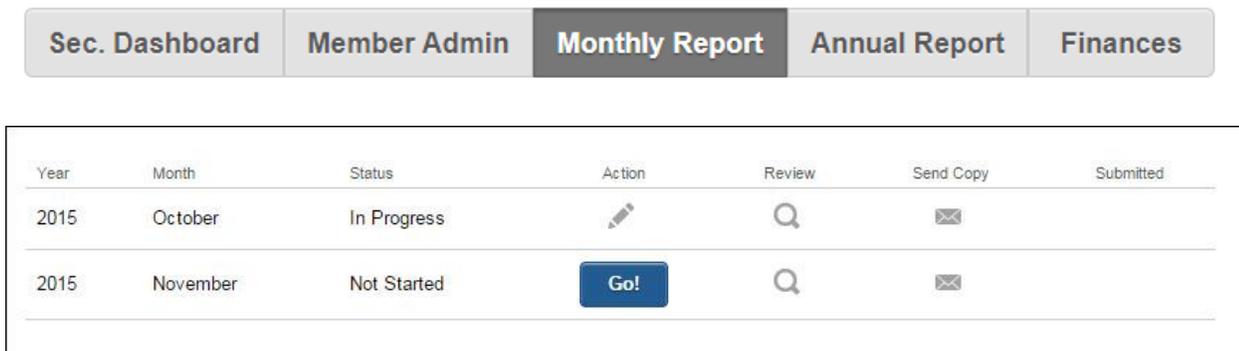


Year	Month	Status	Edit	Currency	Review	Send Copy	Submitted
2018	October	Submitted		USD			

STARTING A NEW REPORT

Click the blue **GO** button to begin a new report.

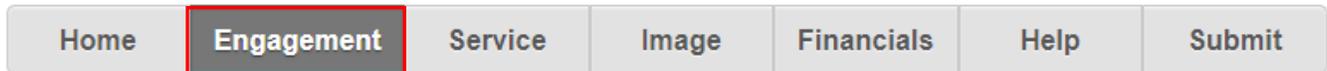
Note: once a report has been started, the GO button will change to a pencil icon (to signify editing) the next time it's accessed. Reports can be saved and returned to later. Sections of the report can be completed in any order you wish.



Year	Month	Status	Action	Review	Send Copy	Submitted
2015	October	In Progress				
2015	November	Not Started	Go!			

The MR questions are grouped into these four areas.

1. Engagement
2. Service
3. Image
4. Financials



ENGAGEMENT

The Engagement tab is found in the second row of tabs near the top of the page. This row helps you navigate the various sections of the MR. You may click in and out of these sections to complete them in any order.

Under the Engagement tab, you will see sub-categories to complete.

- Club meeting attendance
- Interclub activity
- Annual questions

Sometimes, one-time questions known as “custom questions” can be added to a monthly report by either your district leaders or Kiwanis International. Please look through each section carefully to be sure you’ve answered all questions, including custom questions. Each page can be saved only when all required questions are answered. (Required questions are marked with an asterisk.)

*If your club subscribes to the full version of the Portalbuzz club management system, you will have the additional option of importing all your club and interclub meeting dates and attendance. Simply click the Import button, and all club meeting data for the month you are reporting will be imported. The Import button is only visible for Portalbuzz subscribers.

As a Portalbuzz subscriber, if you need to adjust your meeting attendance information, click the magnifying glass icon to jump directly to the Attendance Management page in the Portalbuzz system. You may also make changes directly in the MR once your data has been imported.

Club meeting attendance

Import Import club meeting attendance from Portalbuzz

Please provide information about your club's meeting(s) for this month. The system will automatically populate the number of members in your club as most recently reported to Kiwanis International.

Members in club at beginning of the month: 0

Month / Day	Members in Attendance	Makeups (optional)	Leave of Absence (optional)	Meeting program	Edit	Delete
1/3	6	0	0	<input type="checkbox"/>		
1/17	7	0	0	<input type="checkbox"/>		

Home
Engagement
Service
Image
Financials
Help
Submit

Members

Secretary Dashboard

Club Bylaws

Education

Membership

Inspiration and engagement - January 2019

Save

Please click Save before leaving this page, or your changes will be lost.

Goal: To build, retain and support a growing Kiwanis membership network (includes operation and management of clubs, districts, and division)

This section covers:

- Club meeting attendance
- Potential members
- Interclub activity
- Mentoring and education

*** Required**

Club meeting attendance

Please provide information about your club's meeting(s) for this month. The system will automatically populate the number of members in your club as most recently reported to Kiwanis International.

Members in club at beginning of the month: 21

Month / Day	Members in Attendance	Non-member guests in attendance	Makeups (optional)	Meeting program	Edit	Delete
+ Add New						

Interclub activity

Please indicate your club's interclub meeting dates for this month. Include the TOTAL NUMBER OF MEMBERS who participated in interclub meetings EACH WEEK and the name of the club visited. Add rows as needed.

Month / Day	Members	Clubs Visited	Mi/Km One Way	Within Home Division?	To SLP club?	Edit	Delete
+ Add New							

ANNUAL QUESTIONS

New to the MR in 2019-20 is the Annual Questions feature. These are questions about your club and Kiwanis programs that don't usually change from month to month. This feature is designed to streamline the MR process by asking certain questions one time at the beginning of each new club year. If your answer to an annual question hasn't changed from October's MR, you don't have to answer it each subsequent month — unless the answer changes. At the beginning of each club year, your answers to these annual questions will be reset to "unanswered" or blank. You will then need to answer them for the new club year.

Annual Questions

What is your club's goal for new members added during the 2018-2019 club year?

How many regularly scheduled meetings does your club have each month?
(as stated in your club bylaws or formal agreement)

Number of Bug Programs your club sponsors

Number of Terrific Kids Programs your club sponsors

Does your club currently sponsor a new Kiwanis club? 

Yes

No

What tools or sites does your club use to engage with potential members?*

(check all that apply):

- Facebook
- Twitter
- LinkedIn
- Club website
- Club brochure
- Newsletter
- Service projects
- Club opener
- Membership chair or committee
- Other
- None

SERVICE



Under the Service tab, you will report club activities such as:

- Partnerships
- Service projects

Information about your club’s service projects should be reported in this section. Such information includes total service hours, participants, expenses, youth served, etc. You can also provide text details for your projects.

What constitutes a service project will vary from club to club — so use your best judgement! Service projects reported on the MR should be those directed by the club board of directors and club membership. Service hours can include both planning time and the time needed to execute the project.

Clubs that subscribe to the full version of the Portalbuzz club management system (as described in the Engagement section above) will also be able to import service project information. Please follow the instructions found there.

Meaningful Service - January 2019

Save

Please click Save before leaving this page, or your changes will be lost.

Goal: To perform meaningful service with service to children as our priority.

This section covers:
Service projects

* Required

Service projects

What service projects has your club engaged in this month?* (check all that apply)

<input type="checkbox"/> Baby showers for new and expectant moms	<input type="checkbox"/> Fire and water safety
<input type="checkbox"/> Trauma dolls, stuffed animals for kids in traumatic situations	<input type="checkbox"/> Food distribution/hunger/backpack attack
<input type="checkbox"/> Back to school clothing or school supplies	<input type="checkbox"/> Holiday event
<input type="checkbox"/> Bicycle safety, helmets and rodeos	<input type="checkbox"/> Immunization and vaccination efforts
<input type="checkbox"/> Clothing drive	<input type="checkbox"/> Medical - all kinds
<input type="checkbox"/> Community clean up / Recycling	<input type="checkbox"/> Playground
<input type="checkbox"/> Dental screening/cleaning	<input type="checkbox"/> Reading/literacy
<input type="checkbox"/> Diaper drive	<input type="checkbox"/> Scholarships
<input type="checkbox"/> Dictionary or thesaurus distribution	<input type="checkbox"/> Swimming pool
<input type="checkbox"/> Disaster relief support	<input type="checkbox"/> Youth sports
<input type="checkbox"/> Distribution of car seats	<input type="checkbox"/> Vision screening
<input type="checkbox"/> Tutoring (not reading or literacy)	<input type="checkbox"/> Other
	<input type="checkbox"/> None this month

Service projects activity

Import Monthly Activities

Import your monthly activities totals

Please provide details about the service projects your club completed this month. *Use your best judgement to decide if your projects fit this category. If zero, enter 0.*

Total number of projects completed this month:

Describe any service projects completed this month:

0/1000

Total number of service hours:

(engaged in execution of service project)

Number of members involved in all projects this month:

Number of SLP members assisting in projects this month:

Number of non-members assisting:

Estimate number of youths served by your projects completed this month:

(excluding any SLP members assisting the club)

Number of SLP club projects your Kiwanis club participated in:

IMPORTANT: Always click the SAVE button at the bottom of each screen before you move to the next page or section. If you don't, your work will not be saved, and you will need to enter it again.

IMAGE



Under the Image tab you're asked to provide information about your club's recognition of community leaders, and to confirm your club's web site address is correct.

Custom questions from your district leaders or Kiwanis International may appear in this section from month to month as well.

Kiwanis Image - January 2019

Save

Please click Save before leaving this page, or your changes will be lost.

Goal: To enhance the Kiwanis image worldwide

This section covers:

- Recognition
- PR efforts

*** Required**

Recognition

Which external community members does your club recognize through an awards program? (check all that apply)

<input type="checkbox"/> Athletics coach or staff	<input type="checkbox"/> School staff or leader
<input type="checkbox"/> Business owner/leader	<input type="checkbox"/> Teacher PTA/PTO or leader
<input type="checkbox"/> Chamber of Commerce or leader	<input type="checkbox"/> Other
<input type="checkbox"/> Mayor / Town Council	<input type="checkbox"/> Our club didn't perform any external recognition this month.
<input type="checkbox"/> Local non-profit or leader	
<input type="checkbox"/> Parks and recreation staff or leader	
<input type="checkbox"/> Public servants - fire, police, emergency	

PR efforts

An updated public website is a great public relations tool for your club. This website address also displays in the club locator's results for your club when potential members search for a club to join. Take a moment to be sure this information is correct.

Your club's public website: *No website address on file*

If your club's web address is incorrect or missing, the club secretary can add or edit this information on the secretary dashboard, on the right side under "Club Information". The club meeting location, date and time are also edited in this area.

IMPORTANT: Always click the SAVE button at the bottom of each screen before you move to the next page or section. If you don't, your work will not be saved, and you will need to enter it again.

FINANCIALS



Under the Financials tab, you will report club financial activities.

- Money raised and donated
- Scholarships awarded
- Foundation giving (club, district, and Kiwanis Children’s Fund)
- Other donations

Information about organizations supported by your club, money raised, money donated, etc., are reported in this section. Please indicate the various ways your club has used its funds this month. Use “Other” to list other causes/non-profits you’re supporting. There are only 30 characters allowed in the “Other” field, so please be sure to just list the name of the organization.

Custom questions from your district leaders or Kiwanis International may appear in this section from month to month.

IMPORTANT: Always click the SAVE button at the bottom of each screen before you move to the next page or section. If you don’t, your work will not be saved, and you will need to enter it again.

Financial viability - January 2019

Save

Please click Save before leaving this page, or your changes will be lost.

Goal: To ensure financial viability and responsible stewardship.

This section covers:

- Funding support
- Scholarships
- Children's Fund giving
- Other contributions

* Required

Funding support

Does your club provide funding support to the following organizations?*(check all that apply)

- Local children's hospital
- Local community support
- Local scholarships
- Kiwanis Children's Fund
- UNICEF - The Eliminate Project
- Boy Scouts
- Boys & Girls Clubs
- Children's Miracle Network Hospitals
- Girl Scouts
- March of Dimes
- Other
- None

Money raised

Please provide total money raised by your club this month

Funds raised for service? 

* Amount raised

0

USD

Money donated

Money donated

In the "Money raised" section, report only funds raised for club service projects.

If your club donated funds to the Kiwanis Children's Fund, include all funding regardless of any specific campaign or project for which you might have earmarked your club's donation.

IMPORTANT: Always click the SAVE button at the bottom of each screen before you move to the next page or section. If you don't, your work will not be saved, and you will need to enter it again.

Money donated

Money donated

Scholarships

* Total number of scholarships given

* Total amount provided

USD

Club Foundation

* Amount donated

USD

District Foundation

* Amount donated

USD

Kiwaniis Children's Fund

* Amount donated

USD

Boys & Girls Clubs

* Amount donated

USD

Boy Scouts of America

* Amount donated

USD

Children's hospital / Children's Miracle Network Hospitals

* Amount donated

USD

March of Dimes

* Amount donated

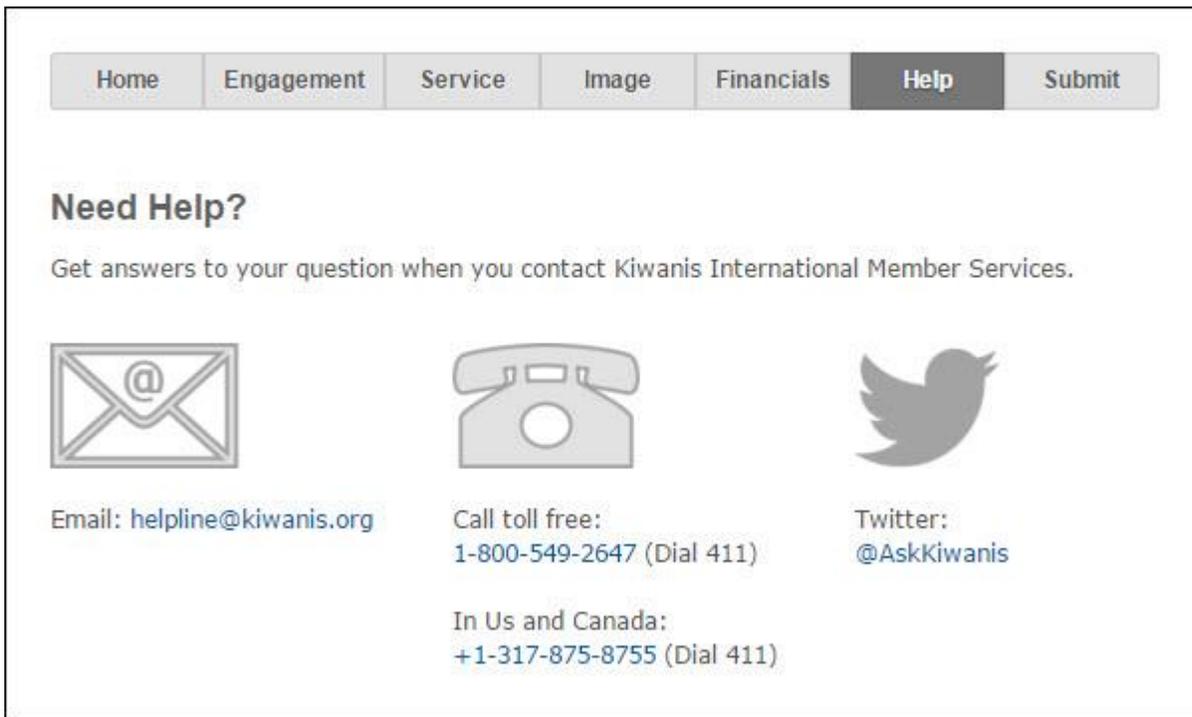
USD

[+ Add other monetary contribution](#)

HELP



Under the Help tab, you will find direct links to Kiwanis International for support of the MR via email, phone, or Twitter. The Kiwanis Member Services team is ready to assist with any questions you have.

A screenshot of the Help page content, enclosed in a black border. At the top is a navigation menu with 'Help' highlighted. Below the menu is the heading 'Need Help?' followed by the text 'Get answers to your question when you contact Kiwanis International Member Services.' There are three columns of contact information: 1. Email: helpline@kiwanis.org, with an envelope icon. 2. Call toll free: 1-800-549-2647 (Dial 411) and In Us and Canada: +1-317-875-8755 (Dial 411), with a telephone icon. 3. Twitter: @AskKiwanis, with a Twitter bird icon.

Need Help?

Get answers to your question when you contact Kiwanis International Member Services.

 Email: helpline@kiwanis.org

 Call toll free:
[1-800-549-2647](tel:1-800-549-2647) (Dial 411)

In Us and Canada:
[+1-317-875-8755](tel:+1-317-875-8755) (Dial 411)

 Twitter:
[@AskKiwanis](https://twitter.com/AskKiwanis)

REVIEW AND SUBMIT



After you complete and save each section of the four-part MR, click the Submit report button. You will then see a status-update box showing your progress with check boxes. You can review your report at any time during the process by clicking the “Click here to review your report” link. This will display a summary of your report.

If any part of your report has not been saved, it will remain unchecked in the row of blue tabs. (See below.)

Nice work!

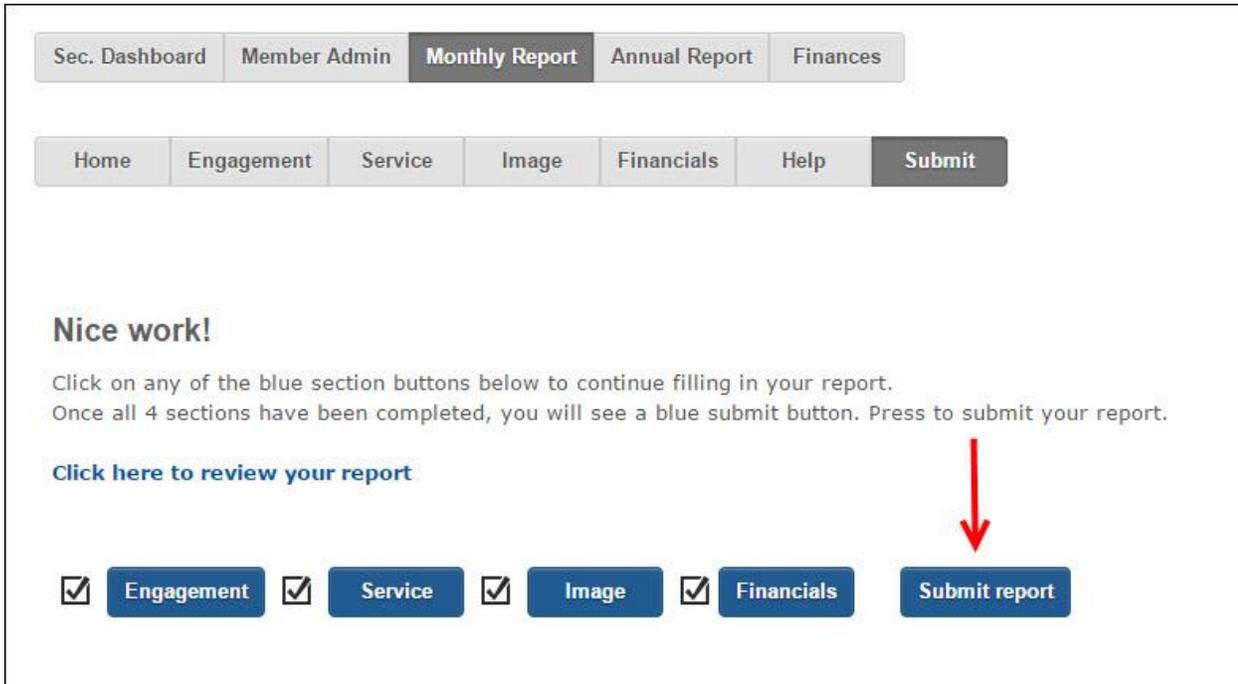
Click on any of the blue section buttons below to continue filling in your report.
Once all 4 sections have been completed, you will see a blue submit button. Press to submit your report.

[Click here to review your report](#)

Engagement Service Image Financials

To complete the unsaved part of the report, click the blue button for that section. That part of the report will then open so you can finish editing it. (Don't forget to save it!)

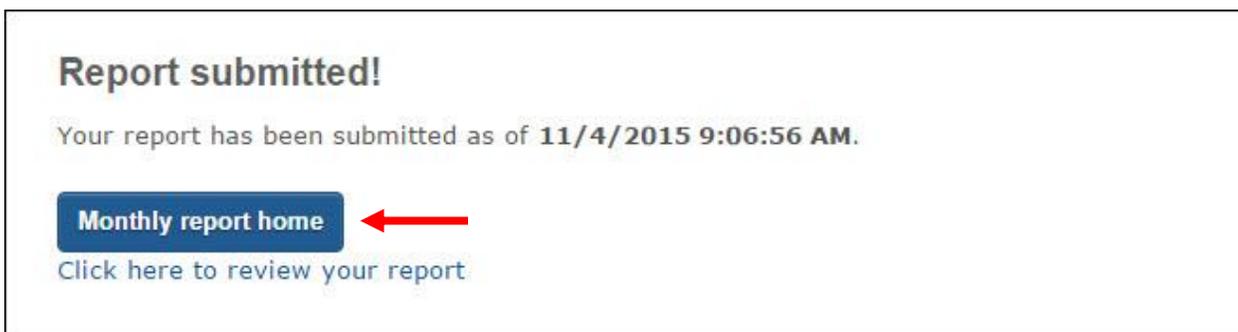
Once you have completed and saved all the sections of the report, you may submit report to Kiwanis International via the Submit report button. This button *only appears when your report is ready* to be submitted.



The Submit screen of the monthly report displays your club’s basic information. This information is shown whether your report is completed or not. This club information helps you confirm the data we have on file for your club’s report.

THE SUBMITTED REPORT

If you have completed and saved all parts of the report *and* you have clicked the Submit report button, you will see a date-and-time stamp confirmation on your screen. This shows that your report has been submitted.



You may click the link to review your completed report, or you may click the blue Monthly report home button to return to the Monthly Report Launch (admin) page.

If you go back to the Monthly Report Launch screen, you will be able to:

- Edit a submitted report or continue/finish a report.
- View the status of all reports for the current fiscal year or past year.

- Review a submitted or in-progress report.
- Download a PDF of your finished report to keep.
- Share a copy of the report with others.

IMPORTANT: You can go back into the MR for any month during the current club year to change any of your answers/information. No edits or updates to any month from the previous year can be made after November 10 of the following Kiwanis year.

SHARING A COPY OF THE REPORT

If you want to email a copy of the completed report to someone, click the envelope icon under Send Copy on the admin screen.

Year	Month	Status	Action	Review	Send Copy	Submitted
2015	October	Submitted			 	

This will open a screen where you may add names and email addresses of recipients.

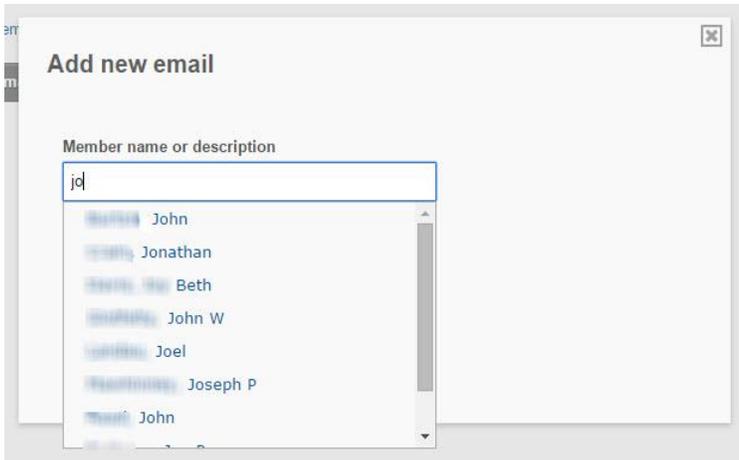
To add a new recipient, click the blue link named “Add new email” (shown below).

Send monthly report preview

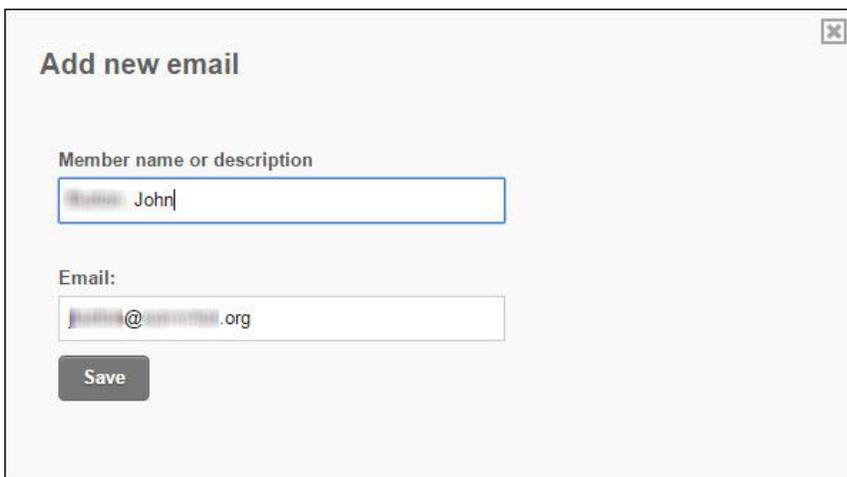
<input checked="" type="checkbox"/> Select	Email	Description		
1. <input checked="" type="checkbox"/>	jonathan. [redacted]@t [redacted].com	[redacted], Jonathan		
2. <input checked="" type="checkbox"/>	[redacted]@kiwanis.org	[redacted]		

[Add new email](#) 

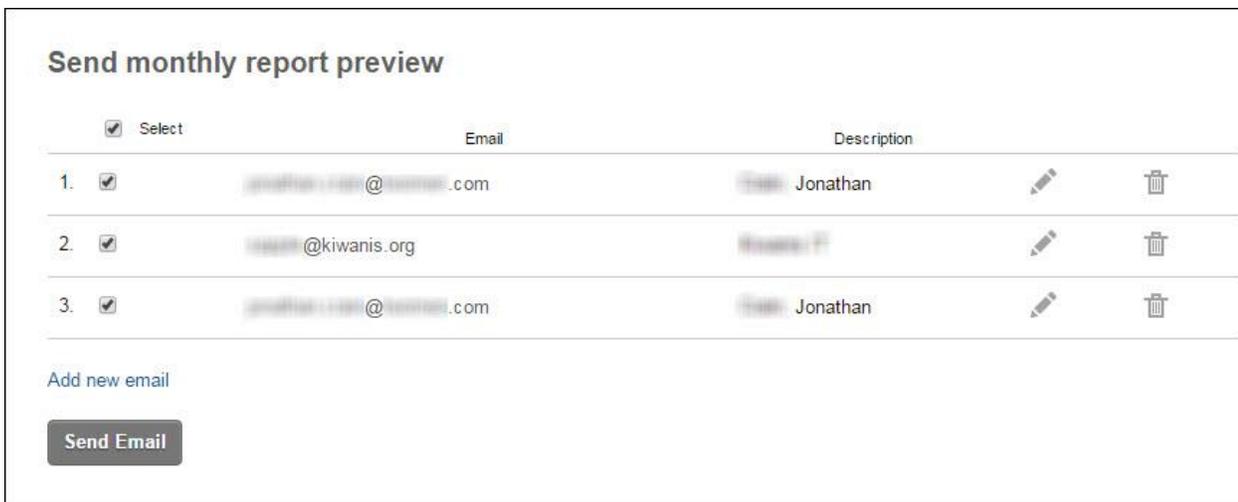
The “Add new email” box (see below) will display the name and email address of your club members and assigned lieutenant governor. As you begin typing the first few letters of the last name, a list of possible names will be automatically generated. If you see the correct name, select it and click the Save button — the name will be added to the recipients list.



You also may type in the full email address of an individual or organization not already in the system.



Check the boxes of the names to receive the copy, then click the Send Email button. These names and addresses will be saved in this list for you to use again to send next month's MR. You can remove any of them by clicking the trash-can icon on the right side of the listed names.



	Select	Email	Description		
1.	<input checked="" type="checkbox"/>	john@kiwanis.org	Jonathan		
2.	<input checked="" type="checkbox"/>	john@kiwanis.org	Joseph P		
3.	<input checked="" type="checkbox"/>	john@kiwanis.org	Jonathan		

Add new email

Send Email

Once the copy has been sent, you will automatically be returned to the Home (admin) screen.

MONTHLY REPORT TIPS

- The currency used for all your monthly reports will be automatically set for your club based on the currency in your part of the world.
- As previously discussed, reports may be edited, saved and submitted as many times as needed. If you submit a report with an error or simply need to make an adjustment, go back to the report and click the edit (pencil) icon. When you're ready, save the changes then resubmit the report. Make sure to resubmit by November 10 of the following Kiwanis year (Kiwanis years end on September 30).
- The club Annual Report will be compiled automatically if you have filed each of your monthly reports for the Kiwanis year. This is a huge time-saver for Kiwanis club secretaries — it means you don't have to keep 12 months of records or total all the data and add it to the Annual Report. Some club secretaries prefer to enter information into the Annual Report in November for the entire previous club year, *but it must be submitted by November 10*. You will have the chance to review and approve all the information before officially submitting it.