



**SECRETARY**

# SECRETARY

Your diligence and passion inspired your fellow Kiwanians to give you one of the club's most important jobs. By maintaining accurate club and membership records, keeping official meeting minutes and making connections in the community, you'll keep your club informed and engaged. The information you submit will reflect the relative health and vibrancy of your club. Your club's leadership team will be stronger and more efficient, thanks to your communication skills and attention to detail.

## RESPONSIBILITIES

The club secretary ensures club operations run efficiently and manages many of the details that make the club experience great. The secretary works closely with the president and board of directors and is responsible for the management of all club records. As an officer of the club and a member of the board of directors, the club secretary can participate in all board discussions and vote on any question put to vote by the presiding officer. Club secretaries will find a list of resources at [kiwanis.org/leadershipguide](http://kiwanis.org/leadershipguide).

## SKILLS

- Willingness to learn necessary technology and use Kiwanis online reporting systems.
- Ability to discern and summarize action items and key points from meetings.
- Organized.
- Deadline-driven.
- Effective communicator.

## 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.

## REVIEW

1. Put a star next to the responsibilities and duties your club is doing well.

2. Circle the responsibilities and duties your club is not currently doing.

*If you are struggling with any of the outlined duties, please reference [kiwanis.org/leadershipguide](http://kiwanis.org/leadershipguide).*

## FILES TO BE MAINTAINED BY THE SECRETARY

- All correspondence
- Convention information for the district and Kiwanis International
- Service Leadership Programs documents and communications

### REVIEW

Where are these files located?

Who else has access to them?

## PERMANENT FILES TO BE MAINTAINED BY THE SECRETARY

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

Kiwanis International's online reporting system tracks many permanent records for your club, but this system has just been introduced in recent years. Be sure you have the last seven years of records in your files either electronically or in print.

- Annual club reports of past years
- Club bylaws
- Former members' entry and deletion dates
- Life Member Status recipients
- Membership payment of fees and dues
- Membership: current roster and biographical information
- Membership records for current members (Kiwanis International forms)
- Annual billing reports

# 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 of 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.
- Automatically send reports to club leaders, your district leadership team, Kiwanis International and others you include on your email list.
- 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.
- Submit your club's voting delegates for Kiwanis International convention.
- Update club meeting time and location as well as signature project information that's shared with potential new members via the Find a Club locator map on [Kiwanis.org](http://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.

Certain areas of online reporting are currently 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.

## THINK ABOUT IT

Are you consistently completing or submitting your monthly club report?

## DID YOU KNOW?

The information in your report is accessible to your governor and lieutenant governor.

# Club bylaws

The Standard Form for Club Bylaws is submitted online by the club secretary or club president. Everything is listed in step-by-step instructions in case you forget anything on [kiwanis.org/leadershipguide](http://kiwanis.org/leadershipguide).

To access the club bylaws, log in to Kiwanis club management or go through the Kiwanis website at [kiwanis.org/login](http://kiwanis.org/login).

Read the “Bylaws and policies” FAQ document found at [kiwanis.org/clubbylaws](http://kiwanis.org/clubbylaws) to find the answers to common questions regarding the process before you get started. A PDF copy of the bylaws and policies template has been provided for review and discussion by your club — but note that all submissions should be made through the online Club Bylaws Management Center. As you proceed through the steps online, feel free to edit, save and return to the form as needed. Once all updates have been made as directed by club membership, complete and submit the online form.

**DID YOU KNOW?**  
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.

**THINK ABOUT IT**

When did your club last review its bylaws?



# Staying organized

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	
<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="http://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 FORMS

<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 DUE DATES

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

## MONTHLY CHECKLIST

The months before you take office are a good time to get acclimated to your new role. During this time, work in conjunction with the current club secretary to ensure a smooth transition. Also consult the monthly task list at [kiwanis.org/leadershipguide](http://kiwanis.org/leadershipguide).

## NOTES

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