

2024 CLUB LEADERSHIP EDUCATION

Club Treasurer

Lynsy Karrick, Director of Leadership Development
Bryce Kinder, Member Experience Engineer

August 12, 2024



Agenda

- 1.Kiwanis 101
- 2.Role and responsibilities
- 3.Review key resources
- 4.Member dues
- 5.Club accounts
- 6.Club giving
- 7.Budgeting process
- 8.For United States clubs only
- 9.Receive attendance credit





KIWANIS 101

Organization basics

KIWANIS 101

- **MOTTO**

Serving the children of the world.

- **DEFINING STATEMENT**

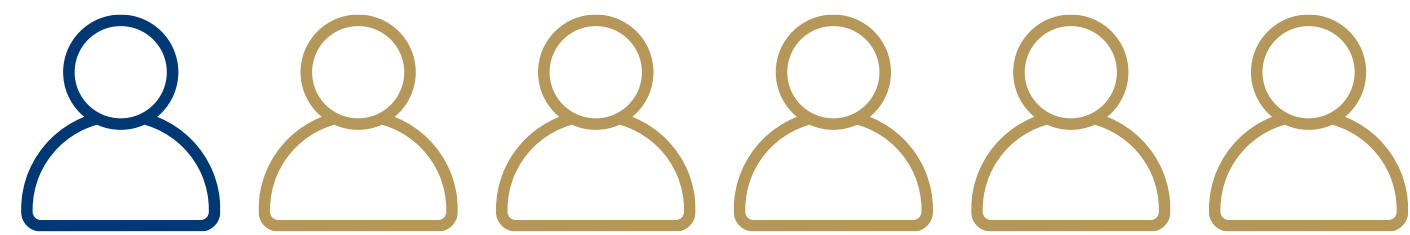
Kiwanis is a global organization of volunteers dedicated to improving the world one child and one community at a time.

- **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

Club



Club president, president-elect, secretary, treasurer, board of directors

Division



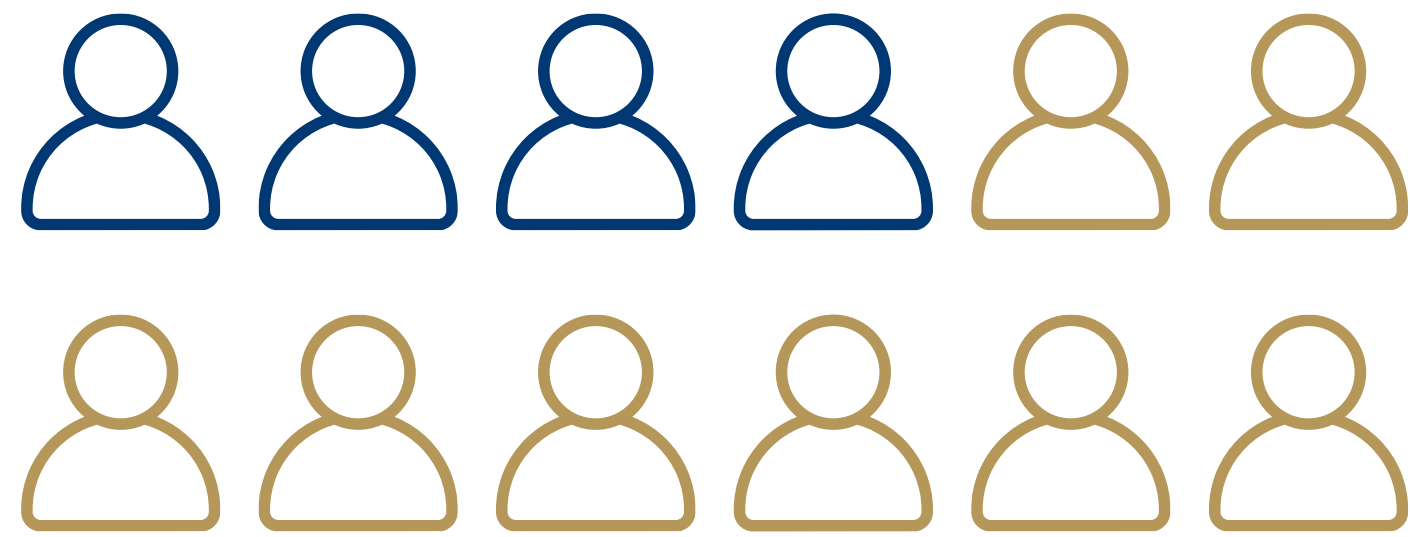
Lieutenant governor

District



District governor, governor-elect, secretary, treasurer, district chairs

Kiwanis International



President, president-elect, vice president, immediate past president, trustees

YOUR DISTRICT

- Name of your district
- What states/regions/territories your district covers
- How many divisions are in your district
- Which division your club is located in

WHO'S WHO

- District Governor:
- District Governor-Elect:
- District Secretary:
- Lieutenant Governor:
- Regional trustee*:



THE KIWANIS OBJECTS

In 2024 we celebrate the 100th anniversary of the adoption of the Kiwanis objects!

- To give primacy to the human and spiritual, rather than to the material values of life.
- To encourage the daily living of the Golden Rule in all human relationships.
- To promote the adoption and the application of higher social, business and professional standards.
- To develop, by precept and example, a more intelligent, aggressive and serviceable citizenship.
- To provide, through Kiwanis clubs, a practical means to form enduring friendships, to render altruistic service and to build better communities.
- To cooperate in creating and maintaining that sound public opinion and high idealism which make possible the increase of righteousness, justice, patriotism and goodwill.

What do the Kiwanis objects mean to you?

KIWANIS STRATEGIC PLAN

- **MEMBERSHIP AND ENGAGEMENT**

Build, retain and support Kiwanis membership network.

- **LEADERSHIP AND EDUCATION**

Develop competent, confident and caring leaders across the Kiwanis family.

- **COMMUNITY IMPACT**

Perform meaningful service, with service to children as our priority.

- **FINANCIAL VIABILITY**

Ensure financial viability and responsible stewardship.

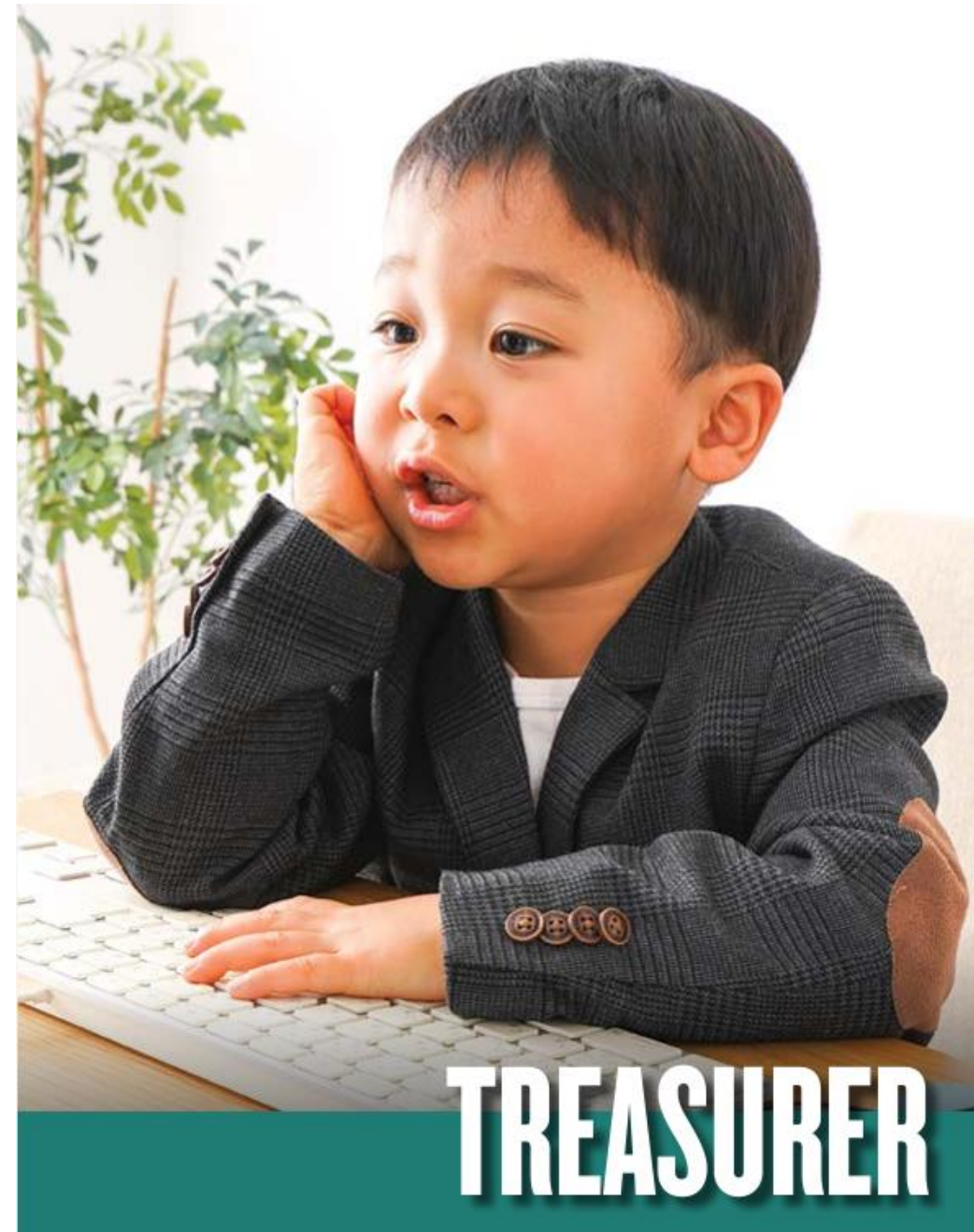
- **BRANDING AND IMAGE**

Enhance the Kiwanis image and brand worldwide.

**How can you help your club
focus on the priorities laid
out by the strategic plan?**



ROLE AND RESPONSIBILITIES



Responsibilities

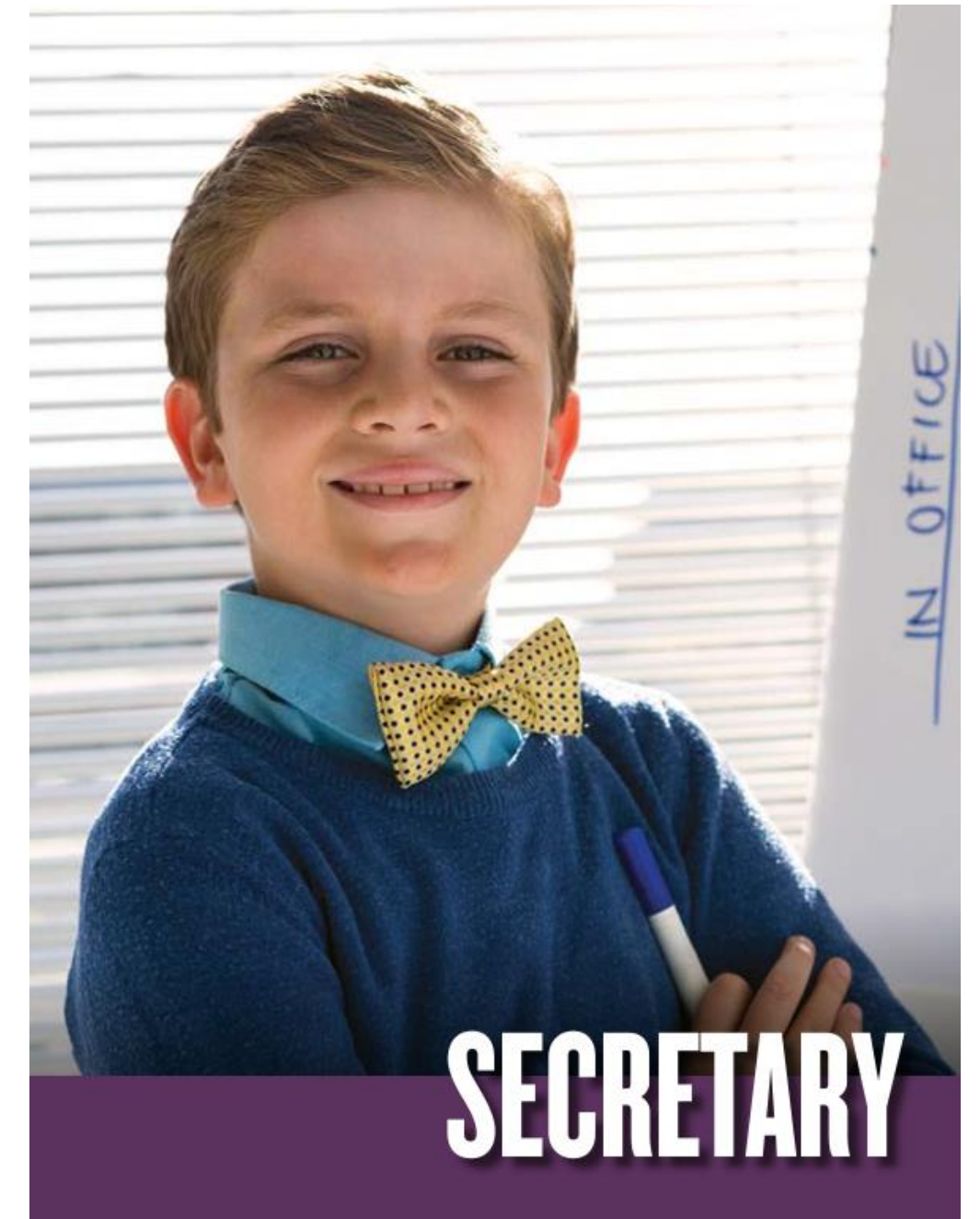
- Good financial stewardship.
- Collecting funds.
- Preparing annual budget.
- Creating monthly reports.
- Creating annual financial summary.

What qualities do you think make for a great club treasurer?



KEY RESOURCES

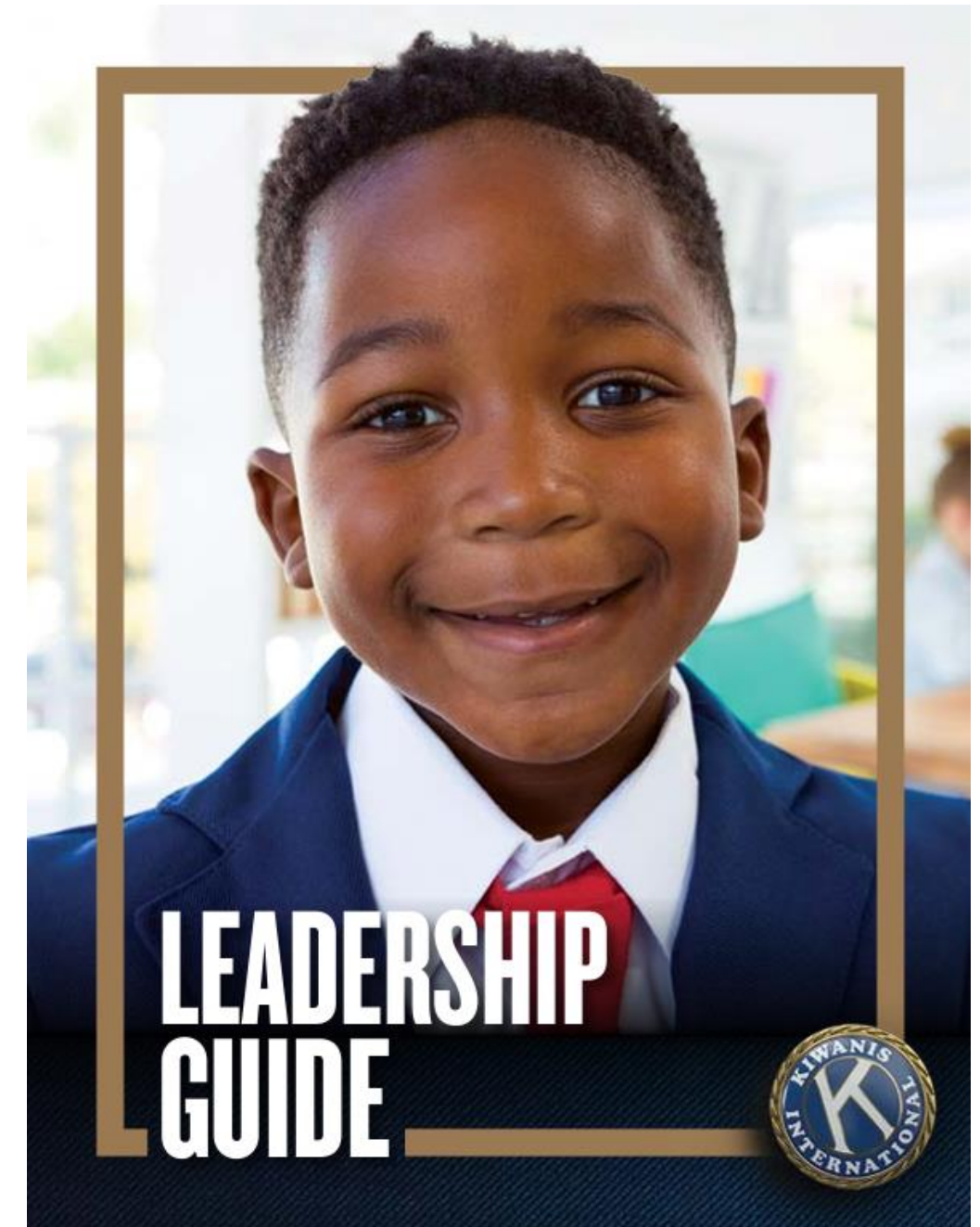
- Leadership Guide
- Club treasurer website
- Club treasurer annual checklist
- Youth protection guidelines



Leadership Guide

[Kiwanis.org/leadershipguide](https://www.kiwanis.org/leadershipguide)

- Kiwanis 101 information
- Club treasurer section
- Club president, secretary and membership chair sections
- Resources section



Club Treasurer Website

Kiwanis.org/clubtreasurer

- Leadership Guide link.
- Monthly checklist.
- Budget template.
- Sample club invoice.
- Links to IRS forms.
- Instructions to obtain a club EIN.
- Club foundation information.
- Kiwanis member dues.



Club Treasurer Annual Checklist

Kiwanis.org/clubtreasurer

- To-do items.
- Deadlines.
- Helpful tips.

CLUB TREASURER ANNUAL CHECKLIST

Monthly Duties

- Prepare the monthly report for the board.
- Receive all funds paid to the club and deposit them promptly.
- Prepare and disburse invoices to members.
- Reconcile cash accounts.
- Pay all expenses in a timely manner.

Annual Duties

- Pay club dues and fees to Kiwanis International. (Due in December.)
- Pay dues and/or member fees for your sponsored Service Leadership Program clubs.
- Mail club donations to the Kiwanis Children's Fund annual campaign in November or with your annual dues and fees in December.
- Ensure the club has an annual audit of club accounts.
- File a Form 990, 990-N or 990EZ with the Internal Revenue Service (IRS) by February 15 (U. S. clubs only).
- Get information at kiwanis.org/form990.
- Ensure maintenance of club's corporate status within its state. This is completed either annually or bi-annually, depending on the state.

JULY-SEPTEMBER 2024

Checklist

- Meet with the president-elect and the current treasurer to review responsibilities and current procedures.
- Review the resources in the treasurer section of the Leadership Guide and at kiwanis.org/clubtreasurer, including the sample forms.
- Attend the budget planning meeting, which will be scheduled by the president-elect. The club's annual budget is due, if possible, before October 1 — and no later than October 15.

JULY-SEPTEMBER 2025

Checklist

- Meet with your president-elect and the incoming treasurer to review responsibilities and current procedures.
- Transfer all materials to the incoming club treasurer before October 1.

Youth Protection Guidelines

kiwanis.org/youthprotection

- Policies and procedures.
- Youth protection training.
- Background check information.
- Other resources.



MEMBER DUES



International Dues



Dues and Fees:

- Kiwanis International Dues: US\$77.00*
- Directors & Officers Insurance: US\$4.00**
- Publication Fee: US\$8.00***
- Liability insurance: US\$18.00**

kiwanis.org/dues

**Tier 1*

***Only clubs in the United States and Canada*

****Only clubs in the United States and English-speaking clubs in Canada*

Membership Dues



Dues and Fees:

Kiwanis International Dues	US\$107.00*
District Dues	US\$00.00
Club Dues	US\$--.00

**Tier 1, including Directors' and Officers' insurance and publication fee.*

kiwanis.org/dues
kiwanis.org/districtdues

Dues Invoicing Process



Invoice.

- New member adds must be complete by September 30.
- Member deletions due by October 10.



Mailing.

- Last week of October/first week of November.
- Club secretary.



Payment.

- Finance tab.
- Online (North America only).

Collecting Member Dues

Best Practices

- Collect dues from members by October 1.
- Collect payment electronically.



Member Statements



Details to include:

- Total amount due.
- Outline of dues and fees.
- How and when to remit payment.

**Dues and fees are not considered a tax-deductible expense (U.S. only)*

CLUB ACCOUNTS



Administrative Accounts



INCOME

- Dues.
- Membership fees.
- Meals (if applicable).
- Assessments.

- Kiwanis International and district dues.
- Convention travel.
- Club programming.
- Meals.
- Club newsletters.
- Liability insurance.

EXPENSES

Service Accounts



INCOME

- Fundraising projects for public.
- Member-only fundraising projects.

- Club service activities.
- Charitable or educational activities.
- Sponsorship of Service Leadership Program clubs.

EXPENSES

Annual Audit

- Legal requirement.
- Completed by independent auditor or an internal committee.
- Consult Standard Form for Club Bylaws.





CLUB GIVING

Club Grants



Requirements:

- Kiwanis-led.
- Fill a documented need in the community.
- Recur at least once per year.
- Support activities within one of the Children's Fund cause areas.

kiwanis.org/clubgrants
kiwanis.org/microgrants

Club Foundations

- Only some clubs have a club foundation.
- Clubs must seek Kiwanis International's consent.
- Clubs will create their own articles of incorporation and bylaws.
- Banks have specific requirements for foundations.



BUDGET PROCESS



Budget Timeline

August

Committees
submit budgets



Board approves
a budget

September

Monthly

Give financial report to
board



Give annual
financial report
to club

Annually

Anytime

Create a projected ROI
for club activity



Files to be Maintained

- Club checkbook.
- Paid invoices file.
- Cash receipts file (deposit records).
- Bank statements and reconciliations.
- Treasurer's reports.
- Budget files.
- Official documentation required by state or local law.



Permanent Records

- Cancelled checks (seven years).
- Invoices.
- Financial records and reports.
- Official documents related to the club foundation.



FOR UNITED STATES CLUBS ONLY



Incorporation

- Each club is required to incorporate.
- Confirm your club has original paperwork.
- Kiwanis International and your state or local government needs a copy.
- Incorporation must be renewed **annually**.

kiwanis.org/clubtreasurer



U.S. Revenue Act Regarding Fundraising Solicitations



Federal legislations requires that *any* fundraising solicitation on or behalf of Kiwanis clubs and district must include an express statement that:

“contributions or gifts to the club are not deductible as charitable contributions for federal income tax purposes.”

The statement must be in a conspicuous and easily recognizable format regardless of format.

Kiwanis International and Kiwanis clubs are 501(c)(4) organizations.

Form 990



The IRS requires all United States-based Kiwanis clubs to submit a 990 form annually, no later than February 15.

Failure to file in a timely manner may put your club's incorporation status at risk.

kiwanis.org/form990



Attendance Credit

- Completion Survey: <https://forms.office.com/r/RaYJBxG9PG>

**12-digit member ID is required
to receive credit for this training**



Step 1: www.kiwanis.org/login



English ▼

Welcome to the Kiwanis International sign-in page — Kiwanis Connect

First time here? [Set your password here.](#)

Sign in

Email

Forgot your password? [Change the password.](#)

Have a paid Portalbuzz subscription?

[Sign in with Portalbuzz](#)

Password

Submit



Step 2: Login



English ▼

Welcome to the Kiwanis International sign-in page — Kiwanis Connect

First time here? [Set your password here.](#)

Sign in

Email



Forgot your password? [Change the password.](#)

Have a paid Portalbuzz subscription?

[Sign in with Portalbuzz](#)

Password

Submit



If you haven't logged in before...

English ▾

Welcome to the Kiwanis International sign-in page — Kiwanis Connect

First time here? [Set your password here.](#)

Sign in

Email

jchoi@kiwanis.org



Forgot your password? [Change the password.](#)

Have a paid Portalbuzz subscription?

Sign in with Portalbuzz

Password

.....

Submit



If you haven't logged in before...

- Use the email you originally used to register for Kiwanis.
- Contact memberservices@kiwanis.org or your secretary if you're unsure which email to use.

Set Password

A link to set your password will be sent to your email address.

Email



Step 3: Select your club



[Home Page](#) [English ▼](#) [Impersonate](#) [Change the password](#) [Sign out](#)

Julia Choi

Select your group






Group

Kiwanis International Staff (K-STAFF) ▼

Submit





Step 4: Copy your member ID


 **Kiwanis** KEY CLUB  **CKI** Circle K International  **ACTION CLUB**  **Builders Club**  **K-Kids** Young Leaders Helping Others


Julia Choi
Kiwanis International Staff


Sign Out


 Me

 Education


 Full Education Report


 Admin Tools


 Membership


 **Julia Choi**
Kiwanis International Staff(K-STAFF) | Member ID: 000006435402 |


This area of the Club Management System gives you access to special applications and reporting, all with a single login. Your club or district leadership position determines what applications are available to you. Don't see what you need? Contact kiwanisone@kiwanis.org for assistance.

 Background Checks

 Edit profile picture

 Edit Profile

 Create Praesidium Account

 Click Here to Access On-line Chaperone Policy Training or Global Leadership Certificate Courses.



Attendance Credit

- We cannot assign credit without your member ID.
- If you cannot find your ID/Login, contact memberservices@kiwanis.org
- Survey must be completed by **September 15th**.



THANK YOU



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Director of Leadership
Development

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BRYCE KINDER

Member Experience
Engineer

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