

New York District of Circle K International  
**Treasurer Handbook**  
2015 – 2016



# Table of Contents



Page 3 .....	Welcome from the District Treasurer
Page 4 .....	Duties of a Club Treasurer
Page 5 .....	Club Treasurer Goals
Page 6 .....	Terminology
Page 7 .....	Membership Dues
Page 8 .....	Membership Update Center
Page 9 .....	Dues Payment Plan
Page 9 .....	Sample Dues Payment Plan
Page 10.....	Dues Benefits
Page 10.....	Dues Breakdown
Page 11.....	Budget Plan
Page 12.....	Kiwanis & the SAG

# Welcome and Introduction

Hello!

My name is Joshua (Josh) Hill and I am the 2015-2016 District Treasurer for the New York District of Circle K International. I am here as a go-to resource on anything and everything Circle K for you and your club, but especially when it comes to the club treasurer and all duties/tasks related to the position. I've created a resource that follows this page as a guide on how to successfully be a Treasurer! Do not view this handbook as an end-all-be-all when it comes to the position, but rather a guide that will help you along, where you can customize it to how your own specific club runs.



A little bit more about myself: I am a sophomore at the University of Rochester, studying Political Science with clusters in Mathematics and Legal Studies. Originally from Webster/Penfield, NY, I've been involved with the Kiwanis Family since freshman year of high school with Key Club; here, I served as Lieutenant Governor for two (2) terms and the Lieutenant Governor at-large/Division Liaison for another term. Prior to being elected District Treasurer, I was Lieutenant Governor of the Seneca Division here in NYCKI. My favorite food is macaroni and cheese; my favorite color is blue (but every shade of blue except royal blue and traditional blue and every shade in between); and my favorite animal is a turtle. Outside of Circle K, I'm involved with our Students' Association Government; I'm a tour guide, a Resident Advisor for freshmen, as well as a Haudenosaunee Nations Scholar and a Kearns Scholar.

If at any point throughout the year you have any questions, comments, or concerns, please do not hesitate to reach out to me at [josh.hill@nycirclek.org](mailto:josh.hill@nycirclek.org). As I mentioned above, I am a resource to you and your club. You're a part of a great organization that works everyday to serve and better the world we live in, be sure you read through this guide to see how you can most effectively perform in your position to help our organization grow to be ever better.

Yours in Service, Leadership, and Fellowship,  
Joshua Hill  
2015-2016 District Treasurer

# Duties of a Club Treasurer

## Yearly Duties

- 1) Obtain any material passed down to you by the previous treasurer
  - a. Figure out what fundraisers you would like to continue and which ones didn't work out from before
  - b. Find weaknesses and make a goal to improve them
- 2) Attend District Events
- 3) Recruit new members and continue recruiting members throughout the year
- 4) Collect dues during dues season (September to December)
- 5) Make sure your club maintains active status by paying your club dues (district and international) by December 1, 2015!
- 6) Maintain an up-to-date club roster
- 7) Update the Membership Update Center
- 8) Make a dues payment plan
- 9) Create goals for your club
- 10) Organize and maintain a budget for your club
  - a. Some clubs have 2 budgets: an administrative budget and a fundraising budget
- 11) Develop new leadership
  - a. Find a successor

## Monthly Duties

- 1) Fulfill any duties delegated to you by the president or any other officer, or help out whenever you can AT ALL TIMES
- 2) Communicate with your Lieutenant Governor, District Treasurer, and other members of the New York

District!

- 3) Help organize and run fundraisers
  - a. This also means being responsible for managing fundraisers
  - b. Collecting money generated from fundraisers
- 4) Attend Kiwanis Family events
  - a. Let them know if you need anything or just thank them for their support
- 5) Make sure you are keeping up with your goals

## Weekly Duties

- 1) Encourage members to pay their dues
- 2) Communicate with your e-board (socially and about CKI business)
- 3) Promote CKI on campus by encouraging more members to join!
- 4) Make sure that service projects are being organized
- 5) If you have any fundraisers coming up, make sure you are keeping up with the checklist
- 6) Send sponsor or fundraising letters if they need to be sent

## Everyday Duties

- 1) Collect dues from members who can't come to meetings
- 2) Keep in touch with your e-board about any plans for meetings
- 3) Promote Circle K on campus and to your friends
- 4) Be proud of what you stand for and never forget that service never ends

# Club Treasurer Goals

**Goals** are much easier to understand and actually accomplish when they are split into categories. This way, it is easier to delegate responsibilities and understand the best way to achieve them. These goals, that you come up with, will help you keep track of your progress, celebrate what you have achieved and continue striving for what you still want to accomplish. These are some specific goal examples you may have or that may inspire you to have different ones that will help your club out during your term.

## Goals on campus:

- 1) Do you want to increase representation and awareness of your club, a certain event, a new program or service project?
- 2) Do you want to pay dues earlier this year?
- 3) Do you want to increase membership?
- 4) Do you want to increase attendance to a particular event or service project?
- 5) Do you want to increase attendance to your meetings?
- 6) Do you want to increase attendance to volunteering events?
- 7) Do you want to work more on your fellowship or social event(s)?
- 8) Do you want to start a project that will help the community around your campus? If you already have one, do you want to continue it or change it?
- 9) Do you want to get more support or start getting support from your SA?

## Goals in Circle-K International:

- 1) Do you want to be mentioned in the CKI magazine for your efforts as a club?
- 2) Do you want to submit an article for a fundraiser or creative idea that was successful to your club?
- 3) Do you want to do more inter-clubbing events?
- 4) Do you want to increase leadership workshops for your e-board or start having them?
- 5) Do you want to start having committee chairs, change positions, add positions, or organize it better?
- 6) Do you want to start inviting or increasing Kiwanians to come to more of your meetings or events?
- 7) Do you want to have a better relationship with your Kiwanis or get to know more Kiwanis clubs around your area?
- 8) Do you want to increase Kiwanis Family participation, or participate in more events with your Key Club or Builders Club near you?
- 9) Do you want to get more support or start getting support from your Kiwanis sponsors or Kiwanis clubs near you?

# Terminology

One of the most confusing things about Circle K is the different abbreviations and terminologies you may have never heard or are still unsure of. Don't feel bad because everyone feels overwhelmed and a little behind once they start. No worries, though, this should definitely get you caught up on the basics of what you need to know.

**Monthly Report Form (MRF):** This is a report that the secretary of your club must fill out the 7<sup>th</sup> of every month. They input service hours, events, and how much your club has fundraised and what goals you have in regards to fundraising, service hours, etc.

**Club Status:** This is given to every club depending on when they pay their dues

- **Active** – Clubs paid on time
- **Suspended** – No payment by November 30<sup>th</sup> (a club can move from suspended to retained with any payment)
- **Retained** – paid for at least one member by September 30<sup>th</sup> of the following year (a club can stay retained indefinitely until any payment is made annually)
- **Inactive** – No payment has been made since September 30<sup>th</sup> of the following year (a club can reactivate it's status by making a full dues payment, submitting a corresponding roster, and paying a \$100 reactivation)
- **Charter Revoked** – No payment has been made for more than two years (Must charter the club all over again in order to regain active status)

**Membership Update Center (MUC):** This is a form that has to be filled online with all the names of the paid dues members in your club and their information, it calculates how much dues you have to pay

**Club Information Listing (CIL):** A report, released by Kiwanis International, listing the club status of all clubs in Circle K

**District Project:** A project, that the district comes up with, that the rest of the clubs in the district are encouraged to support by fundraising, volunteering, or just general promotion

**Governors Project:** A project, that the Governor comes up with, that the rest of the clubs in the district are encouraged to support by fundraising, volunteering, or just general promotion

**International Project:** Kiwanis International comes up with a project to support about every five years that the rest of the Kiwanis Family is encouraged to support and fundraise for

# Membership Dues

**Membership dues** are crucial for the continuation of Circle K International and it is one of your main responsibilities as treasurer to ensure dues are paid fully and promptly. It is important to recognize that while Circle K International is a service-based organization, the benefits of membership extend far beyond our service initiative. It is also your responsibility as treasurer to be fully aware of these benefits for both recruitment purposes and to ensure that members are taking advantage of the benefits for which they paid. This membership dues system is unique to our organization and truly defines Circle K International from other service-based organizations. It can be daunting to tell new members that we have dues but be confident, because everything paid is given back and so much more. Finally, as Circle K members, it is important to keep in mind that we are really part of a larger Kiwanis Family, and that our membership fuels their efforts, which, in turn, support and promote our endeavors.

## *Important Dues Timeline:*

- *Early Bird Deadline - October 1<sup>st</sup>*
- *Regular Deadline - November 1<sup>st</sup>*
- *Last day to pay dues before getting suspended - November 30<sup>th</sup>*

**International dues:** These dues are separate from member dues; they have to be paid by each club annually

- 4 year institution with 5,000 or more students - \$600 (minimum of 20 members)
- 4 year institution with 5,000 or less students - \$450 (minimum of 15 members)
- 2 year institution per capita gross national income of \$10,000 or more - \$300
- 2 year institution per capita gross national income less than \$10,000 - \$150

**NY District Dues:** \$8.00 that every official member has to pay every service year.

Things you need to do:

- Find out which category of International dues your club is under
- Make a dues payment plan
- Figure out if you need extra money for dues from your SA or Kiwanis
- Calculate the minimum amount of members needed
- Make a deadline for when you want dues fully paid (at least the minimum amount of members and international dues)

Typically, International dues and New York District dues are paid together. Club dues can also be collected with this, but the club keeps that money.

# Membership Update Center (MUC)

The **Membership Update Center** is the main database Kiwanis International and Circle K International use to record membership rosters and track dues. You can access the MUC at [www.circlek.org/muc](http://www.circlek.org/muc). Here are some important things you should know about the MUC:

- 1) You have to update the email to your account before you move further! Every year the new treasurer gets to give in their email and password for the account so they can access it. This should be done by the immediate past treasurer, president, or secretary updating the officer list and information; this should grant access to the treasurer to the MUC.
- 2) If you have any members that want to pay dues during the summer or early on during the year, keep the money safe somewhere so you can keep it for when you collect dues for the 2015-2016 CKI year.
- 3) TIP - If you have an advisor you can use their email and password and not have to worry about constantly changing the sign-in account information every year! If you don't have one, try looking for one and you can send their information over to Kiwanis, or if your faculty advisor has changed, make sure you let Kiwanis know by emailing the member services department at [memberservices@kiwanis.org](mailto:memberservices@kiwanis.org). Make sure to include the name of the new Circle-K club, club number, school name (if different from the club name) and the new faculty advisor's name and email address.
- 4) Keeping the names of people who pay dues as they pay (for your own records).
- 5) To register click on "register/reset password". Enter the same email address you gave your president when you got elected. An email will be sent to you so you can verify your account. Sometimes it will go to your spam or junk folder so be sure to check that! If you can't remember the email you gave or aren't able to log in, call CKI International at 1-800-549-2647 ext. 411.

## The Process:

- 1) Go to [www.circlek.org/muc](http://www.circlek.org/muc). Log in with your email and password.
- 2) Click on the "Membership Update Center" tab on the left hand side to access the roster. Change/edit the club membership information as needed by clicking on the pencil icon or deleting it completely and then filling it in.
- 3) To add a new member, you only need the email, full name, and graduation year; you also have the option to add members in bulk.
- 4) To pay your club dues or see how much you have due, click finances. This is the total amount of your international dues plus the \$8.00 per member that you have to pay for district dues.
- 5) You can print an invoice and then send dues in with a check or online to Kiwanis International.

# Dues Payment Plan

- 1) International dues your club owes - \_\_\_\_\_
- 2) Kiwanis support for International dues - \_\_\_\_\_
- 3) SA support for International dues - \_\_\_\_\_
- 4) Fundraised support for International dues - \_\_\_\_\_

**Subtract the total amount of 2+3+4 and from 1.**

- If result is zero, the minimum you can charge your members is \$8.00 for New York District dues. If the result is more, you can charge each member less than \$8.00 (or more if you want to use it as a fundraiser or you can use it to include the price of a giveaway).

- a. Kiwanis Support for district dues - \_\_\_\_\_
- b. SA Support for district dues - \_\_\_\_\_
- c. Fundraised Support for district dues - \_\_\_\_\_
- d. Due paid members - \_\_\_\_\_
- e. Take total number of d multiply by \$8.00 - \_\_\_\_\_

**Take total amount of a+b+c and minus it from total amount of e.**

- If result is zero you are ready to be a fully due paid club of NY District.
- If the result isn't zero you can divide the total by the number of members you have and that is the minimum each member has to pay for you to be a fully paid club.
- If you don't get any support for district dues, you should charge your members \$8.00 to cover them.
- If you don't get full support for International dues and no support for district dues, you are going to need to divide the amount of money left from the bullet point above and divide it by d, that is the amount of money you need to add to each member's \$8.00 district dues.

**EXAMPLE:**

- 1) *Kiwanis support - \$200*
- 2) *SA support - \$0*
- 3) *Fundraised money - \$100*

*\$600 (International dues) - \$300 (\$200+\$100) = \$300*

*If you have a fixed amount of dues per member: \$12 (remember that this has to include the \$8 district dues)*

*\$300 ÷ \$12 = would need a minimum of 25 members to fully pay all dues.*

*If you have a fixed amount of members: 20*

*\$300 ÷ 20 = you have to add \$15 to the \$8 for each members' district dues, so in this example each members' dues would be \$23*

# Dues Benefits & Breakdown

## **Club Benefits:**

- Attending club events and getting your service hours counted for
- Ability to run for Club Office
- Member Benefit Program- each member is presented with a pin, a membership card with a specific membership number, and a membership handbook
- You can make a difference in this world because you have the opportunity to reach so many lives in your community.

## **District Benefits:**

- Ability to run for District Office!
- Attend district events, such as District Convention!
- Great personal interactions with Kiwanians throughout the entire district
- Work with clubs outside of your own school! Meet with CKI members who have similar interests as you and the same desire to serve!

## **International Benefits:**

- Ability to run for International office
- Receive free program and public relation information materials developed by the international office to assist club administration, growth, and development
- Scholarship and networking opportunities
- Insurance at CKI events

**CKI Administration – 12%** (staff travel to district events, printing, postage, telephone, interns, audit, office supplies)

**Club and member support – 14%** (web development, resources, leadership materials, recruitment and retention support, new-club building, membership materials)

**District support – 17%** (Governor and Administrator training conference, administrator mid-year meeting, mailings to sponsoring Kiwanis clubs, awards, and certified instructors)

**Tomorrow Fund and Alumni Relations – 3%** (funds contributed to the Tomorrow Fund, recognition programming, processing, and promotion, alumni development)

**Magazine – 24%** (percentage of staff salary, art, photos, articles, printing, posting, and postage)

**CKI Board and governance – 25%** (liaison visits, president and VP travel, board meetings, governing documents, parliamentarian support, strategic planning, goal promotion, percent of staff salary, and leadership development)

**Projected surplus – 5%** (assures budget flexibility)

# Budget Plan



The **budget** is what keeps the club afloat. Everyone is relying on you to know how your club is going to handle the money aspects of your fundraisers, events, dues, transportation costs, etc. Ultimately, the responsibility will be yours to make sure the event coordinators or volunteers, that are buying supplies or planning fundraisers/projects, aren't going over budget. Some CKI clubs have their own bank accounts and some are handles by their school's Students' Association Government. Regardless of where your money is stored it is your main concern to keep record of everything coming in and out of your account.

Sometimes a budget is more of a trial and error process by fitting things you need with what can be supported, fundraised for, taken from dues, or paid out of pocket. It can be a lengthy process, but most importantly it is just taking experiences and events from the past and keeping what works. Don't hesitate to reach out if you need help planning your budget; you can also talk with your predecessor or Students' Association Government on how it's been done for you club in the past.

Here are some basic things to identify before you start your budget:

- Do you have your own bank account or does the SA handle your money?
- Do you get a certain amount of money every year (and if so, how much and can you appeal for more) or do you have to fundraise all your money?
- Are you allowed to have money rollover at the end of the school year to your next year?
- Does your school give you additional money for your net profit? For example, give you 50 cents for every dollar of net profit you fundraised.
- Has your account ever been overspent or in risk of being overspent?
- Do you have any priorities your club keeps annually? For example, certain events, socials, fundraisers, etc.

# Kiwanis & the SAG



## **KIWANIS**

DO NOT JUST TALK TO KIWANIS WHEN YOU AND YOUR CLUB NEED MONEY! Kiwanis is your biggest supporter. This is the most important thing you should always remember; the Kiwanians in your sponsoring club are there to help you, no matter what. Yes, you should be in discussion with them when looking at how your club will pay dues and how can they help out, but, they should be invited to your meetings and service projects/fundraisers. If you're struggling with anything, don't hesitate to reach out to them to help you and your club out.

It's important to also remember that they are a resource for you, but not your only resource. Kiwanis International is a family, the Kiwanis Family. Each branch is here to help you with any initiative you have AND you should help them with some initiatives they have, as well. The Kiwanis Family is broken up into six (6) branches:

- Kiwanis (adults)
- Aktion Club (adults with disabilities)
- Circle K (college students)
- Key Club (high school students)
- Builders Club (middle school students)
- K-Kids (elementary school students)

## **STUDENTS' ASSOCIATION GOVERNMENT (or another related name)**

The Students' Association Government (SAG) is another great resource for you and your club to use. The SAG is where many clubs will be requesting funding from for events, fundraisers, projects, and dues. Each SAG runs differently from another, so it's important for you to communicate with the immediate past treasurer and the SAG to figure out your relationship and what you specifically need to do to request funding. Try to meet with a representative from SAG on a regular basis to keep them up to date on events and fundraisers you and your club are having, this will create a better relationship between the two of you which will translate into easier communication when requesting funding or their help in any of your club's endeavors.

# Notes





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