

# 21st Century Tools for Leaders of the Future

Presented by Sheila Donald  
E.C.& C. District Convention  
Stratford, Ontario  
May 17, 2019



# Clarity on the following Topics:

- ▶ Members Access (lots of doorways to explore!)
- ▶ LG's Access
- ▶ What's available in each
- ▶ Presidents Access and responsibilities
- ▶ Secretaries Access and Monthly Report
- ▶ What's on the horizon



## Members Access:

- Basic Access in system - Kiwanis International, EC&C and Portalbuzz
- Advanced Access in system if club subscribes to Portalbuzz full club management software
- Access is driven for the KI site by the Secretary with communication to Kiwanis International's Members Services Team



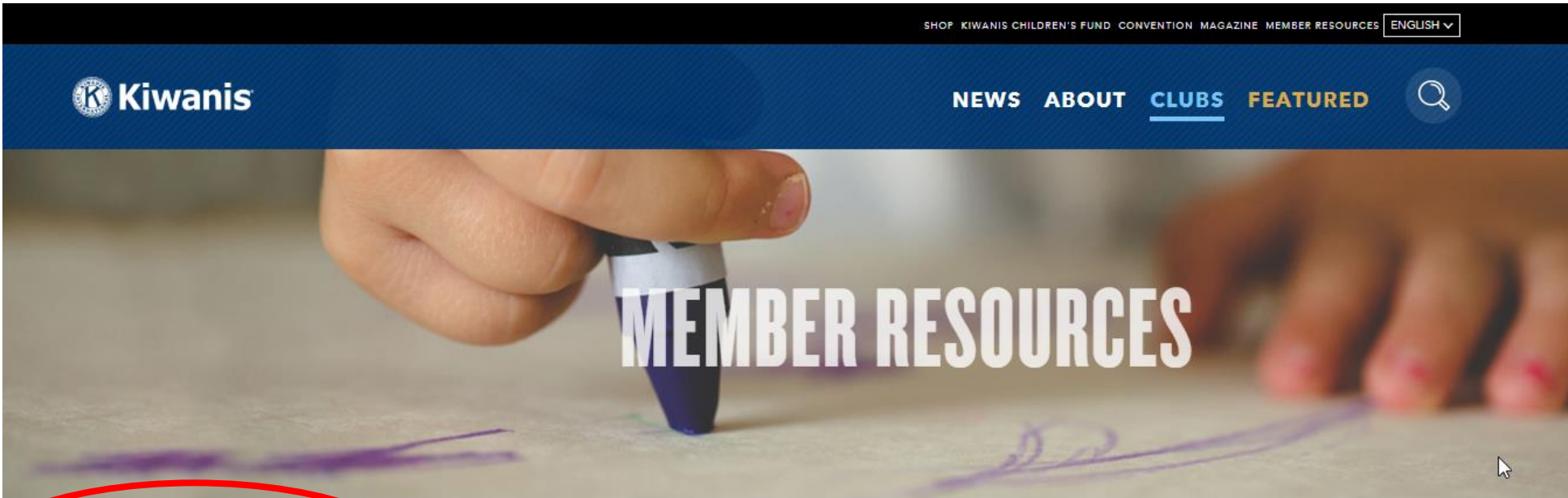
# Entry Points explained:#1

## [www.kiwanis.org](http://www.kiwanis.org) - Member Resources



Choose Member Resources - see the following





Choose Member Login



See the following screen - [www.members.kiwanis.org/SignIn](http://www.members.kiwanis.org/SignIn)

English ▾

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

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

### Sign in

**Email**

**Password**

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

Have a paid Portalbuzz subscription?

[Sign in with Portalbuzz](#)

[Submit](#)

➤ You have a choice here

Sheila Donald

## Select your group

Group

Sarnia-Lambton Golden K (K13016)








Submit

- Things to remember - drop down box available based on your access in the system - LG's are different from this point on
- Most will only see your own club name - choose "Submit"





➤ You are taken to  
<https://reporting.kiwanisone.org>





Sheila Donald  
Sarnia-Lambton Golden K

Sign Out

  
Portalbuzz


  
Me


  
Members



Sheila Donald  
Sarnia-Lambton Golden K(K13016) | Member ID: 000000700310 |

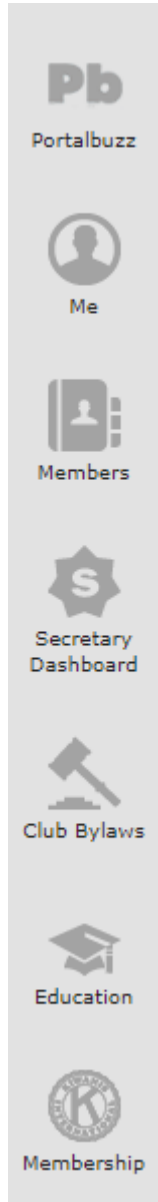
This area of the Club Management System gives you access to special applications and reporting, all with a single login. Your club or district leadership position determines what applications are available to you. Don't see what you need? Contact [kiwanisone@kiwanis.org](mailto:kiwanisone@kiwanis.org)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

 Edit profile picture

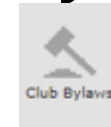
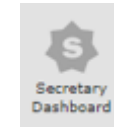
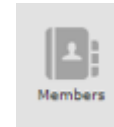
 Edit Profile

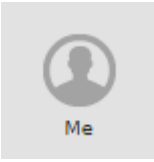




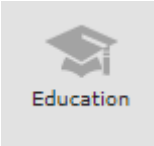


- This is the members side of the Kiwanis International website
- All members can go into this site to participate in Kiwanis produced education modules
- Secretaries will be the only ones with these icons
- This is where they go to file the monthly report

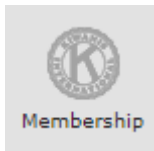




- Edit your own information - email address, phone numbers etc.




- Where you go to review KI created Education material - President/Secretary Education modules as well as Committee and Board Members (CLE Training)



- Where you go to access Membership tools such as membership metrics for the District, club opening tools, club strengthening tools

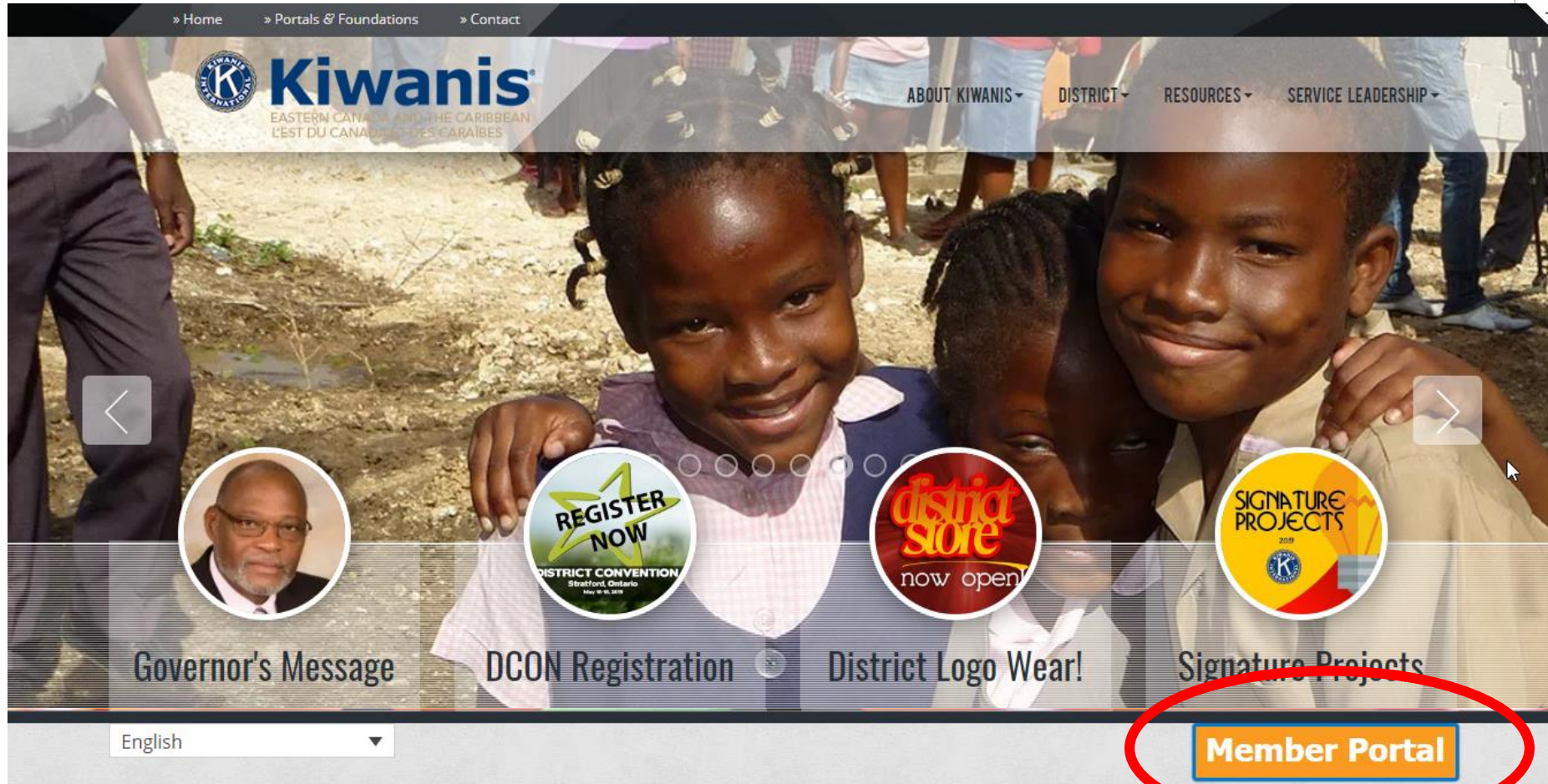




Office/Course	Status	Date Completed	Download Certificate	Action
President	Not Started			<a href="#">Start</a>
Secretary	Completed	12/4/2018		<a href="#">Review</a>
Committee Chair	In Progress			<a href="#">Continue</a>
Membership Committee	Not Started			<a href="#">Start</a>
Youth Protection Guidelines	Not Started			<a href="#">Start</a>
Club Board Member	Not Started			<a href="#">Start</a>
Formador de club	Not Started			<a href="#">Start</a>
Formation de conseiller de club	Not Started			<a href="#">Start</a>
Club Opener	Not Started			<a href="#">Start</a>
Club Counselor	Not Started			<a href="#">Start</a>
Formation de créateur de club	Not Started			<a href="#">Start</a>
Consejeros de Club	Not Started			<a href="#">Start</a>

# Entry Points explained:#2

## [www.kiwanisecc.org](http://www.kiwanisecc.org) - District Website





<https://kiwanis.cpdesk.ca/>

Sign in



Welcome to our Kiwanis ECC Online Portal.

**REGISTRATION FOR THE 2019 CONVENTION IS NOW OPEN**

In order to access our District Portal please click the Login button in the upper left corner of your screen.

Once at the login screen, please enter your e-mail address and the password: **KIWANIS**.

Take note that the password is in capital letters.



- Gives you access to Register for Conventions!
- Gives the Secretary access to put in Delegates!

# Welcome to KIWANIS

Login



[Forgot Password?](#)

[Sign In](#)

Front Page

Please enter your e-mail address for your username and the word KIWANIS for your password. Take note that the word KIWANIS must be in capital letters.



# Entry Points Explained - #3

<https://members.portalbuzz.com>

**Portalbuzz**

## Portalbuzz Login

youremailaddress@webmail.com

.....

☒ Remember me

[Forgot Password?](#)

LOGIN

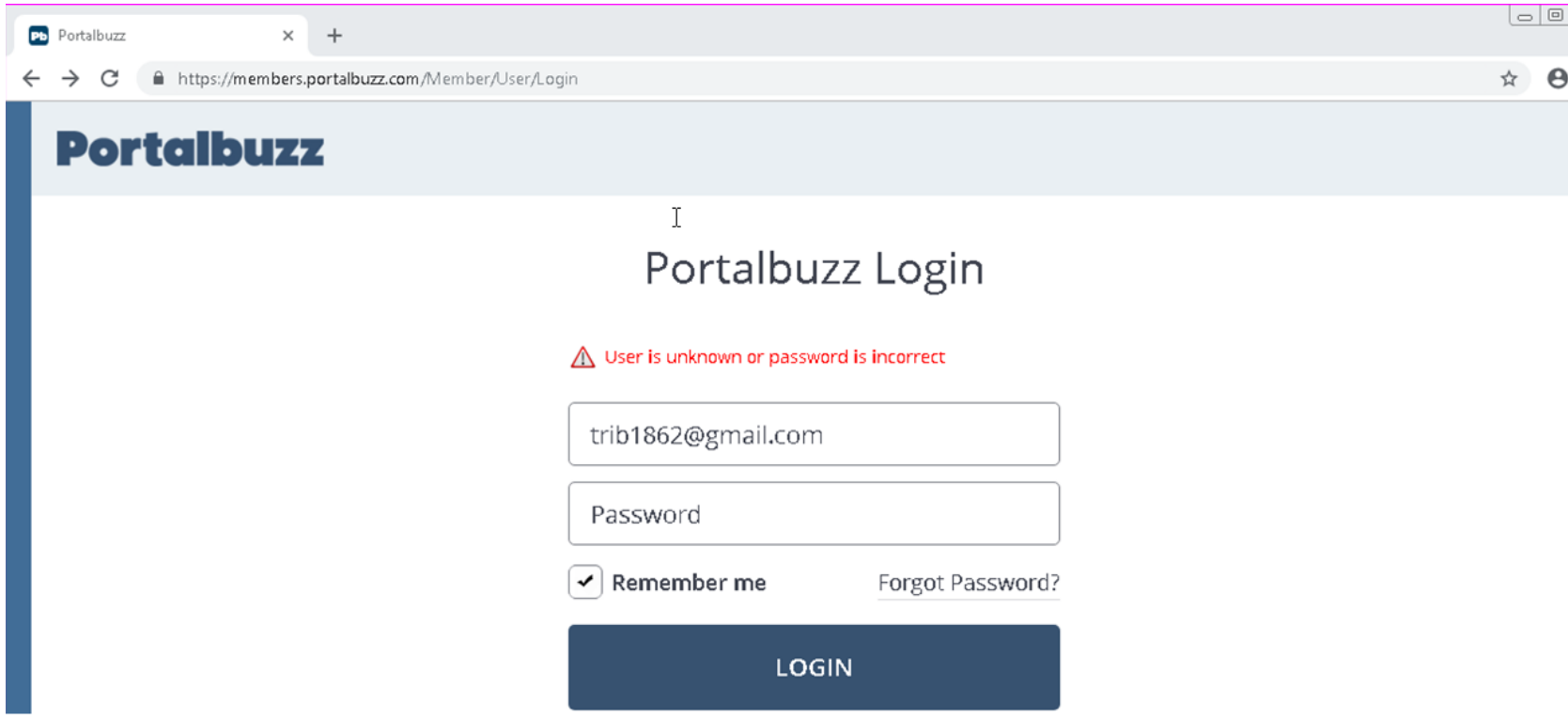
First time logging in?  
[Create a password.](#)

Login not working?  
[Reset password.](#)

Still need help with logging in?  
[Get help.](#)



- Never logged into this site - follow the directions



The screenshot shows a web browser window with the URL <https://members.portalbuzz.com/Member/User/Login>. The page features the Portalbuzz logo at the top left. The main heading is "Portalbuzz Login". Below the heading, a red error message states: "⚠ User is unknown or password is incorrect". There are two input fields: the first contains the email address "trib1862@gmail.com" and the second is labeled "Password". Below the password field, there is a checked checkbox for "Remember me" and a link for "Forgot Password?". A dark blue "LOGIN" button is positioned below these fields. At the bottom of the page, there are three links: "First time logging in? Create a password.", "Login not working? Reset password.", and "Still need help with logging in? Get help."

Portalbuzz

Portalbuzz Login

⚠ User is unknown or password is incorrect

trib1862@gmail.com

Password

☒ Remember me [Forgot Password?](#)

LOGIN

First time logging in? Create a password.

Login not working? Reset password.

Still need help with logging in? Get help.



I

## Set Password

Please enter your email address below and we will send you a link to set your password.

SUBMIT




# Set Password

Check your inbox for the link and instructions to change/reset your password. You should receive the email within a few minutes. Make sure to check your spam folder.

If you don't receive it within 30 minutes, contact us at [support@portalbuzz.com](mailto:support@portalbuzz.com).



# Club does not have Full Club Management system from Portalbuzz





Tracy Bergen ▾

HOME

PEOPLE

KIWANIS

 **Kiwanis**


LEAMINGTON 

The Member Management page displays a list of all the current members of your club. Use the tabs below this paragraph to switch between current and former members as needed. Click the appropriate icon in a specific member's row to view, edit or delete the member's information. NOTE: The ability to edit or delete a member's information varies based on what privileges you have in the system. Send an email to [memberservices@kiwanis.org](mailto:memberservices@kiwanis.org) if you have any questions.

**Member Management**
















All

CorporateHonorarySatelliteFormer




filter by member name

Filter


	Name	Member ID	Email	View
1	 Agocs, April	<input type="text"/>		 
2	 Agocs, Austin	<input type="text"/>		 
3	 Agocs, Ed	<input type="text"/>		 
4	 Bergen, Jonathan	<input type="text"/>		 
5	 Bergen, Tracy	<input type="text"/>		 

# Club does prescribe to the Full Club Management System from Portalbuzz






Sheila Donald ▾

- HOME
- PEOPLE
- CALENDAR
- MEETINGS & EVENTS
- COMMITTEES
- EMAIL
- DOCUMENTS
- NEWSLETTERS

 **Kiwaniis**

SARNIA-LAMBTON GOLDEN K



## Meetings and Events

Upcoming Past

Date ^	Type	Title	Volunteers needed	
May 7	e	House Committee Lochiel Kiwanis Community Centre - 8:00 AM	2	⋮
May 7	m	***Regular meeting: Club Business: Florida Bound - Club Delegates selection and mandate. Election of Directors for 2018-2019 Lochiel Kiwanis Community Centre - 9:30 AM	0	⋮
May 7	c	1.2 Program & Speakers Team committee meeting Lochiel Kiwanis Community Centre - 11:00 AM	--	⋮
May 13	e	PE McGibbon Breakfast Program P. E. McGibbon School - 7:30 AM	1	⋮
May 13	e	Breakfast Program - London Rd. school London Road School - 7:45 AM	0	⋮

1 2 3 4 ... ▶

## Message Hub

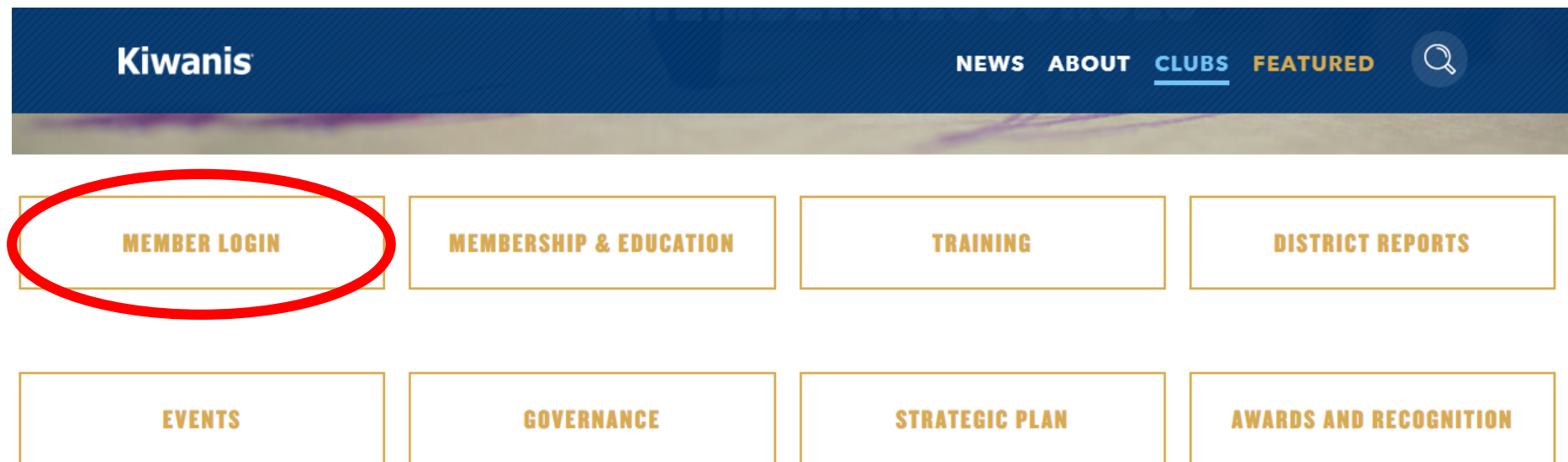
(your username is SheilaDonald89)

## LG's Access explained:





- Access is given to new LG's on Oct. 1<sup>st</sup> yearly
- All information is housed within the Kiwanis International database - membership reports, financial reports, club status etc.
- Go to [www.kiwanis.org](http://www.kiwanis.org) → Member Resources



# Choose “Member Login”

A screenshot of the Kiwanis International sign-in page. At the top, there's a dark blue header with 'English' and a dropdown arrow. Below the header, the text reads 'Welcome to the Kiwanis International sign-in page — Kiwanis Connect'. Underneath, it says 'First time here? [Set your password here.](#)'. The main section is titled 'Sign in'. It contains two input fields: 'Email' with the value 'georgeservice27@gmail.com' and 'Password' with masked characters. To the right of the email field is a link: 'Forgot your password? [Change the password.](#)'. To the right of the password field is a button: 'Sign in with Portalbuzz'. At the bottom left of the sign-in section is a blue 'Submit' button.

# LG's - remember to choose the drop down arrow to change your group!



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

George Service

Select your group

Group

3 St. Clair Bluewater (K2104)

Chatham-Kent (K01949)

Submit



## Access is driven by your choice!



# George's access as an Lt. Governor



George Service  
3 St. Clair Bluewater

Sign Out



Me



District  
Dashboard



Full Education  
Report



**George Service**

3 St. Clair Bluewater(K01949) | Member ID: 000000677381 |

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](mailto:kiwanisone@kiwanis.org) for assistance.



Background Checks



Edit profile picture





Edit Profile




# George's access as a club member

**Pb**  
Portalbuzz

  
Me

  
Education

  
Membership



**George Service**

Chatham-Kent(K01949) | Member ID: 000000677381 |

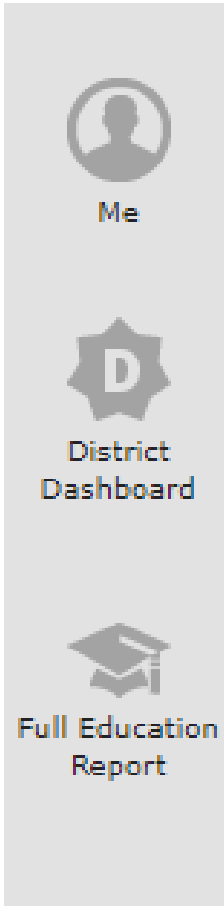
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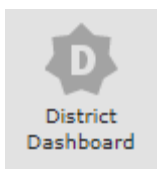
 [Edit profile picture](#)

 [Edit Profile](#)

## Access as an Lt. Governor -

- Edit your own information - email address, phone numbers etc.
- Gives LG's access to the District Dashboard
- Gives LG's access to Education reports for the clubs in his Division and District
- Allows the LG to see if Club Leadership has participated in the formal Education process





# District Dashboard

---

**Club election**

See status of club election submissions and update officers

[Go](#)

---

**Annual membership totals**

View membership and financial information for clubs

[Go](#)

---

**Monthly report status**

View monthly report submission status for all clubs in your district

[Go](#)

---

**Monthly Report Year-to-Date (YTD) Status**

View report status for all 12 months, per club

[Go](#)

---

**Monthly report additional info**

View additional notes added to a report, per club

[Go](#)

---

**Monthly report services**

View basic service and fundraising project data for select clubs in your district

[Go](#)

---

**Monthly report summary**

Select data preferences and compile a summary report

[Go](#)

---

**Monthly report keyword search**

Find service projects by keyword search of title and description

[Go](#)

---

**Interclub activity report**

View all interclub activity for the district as submitted on the monthly reports

[Go](#)

---

**Member search**

Formerly secretary assist

[Go](#)

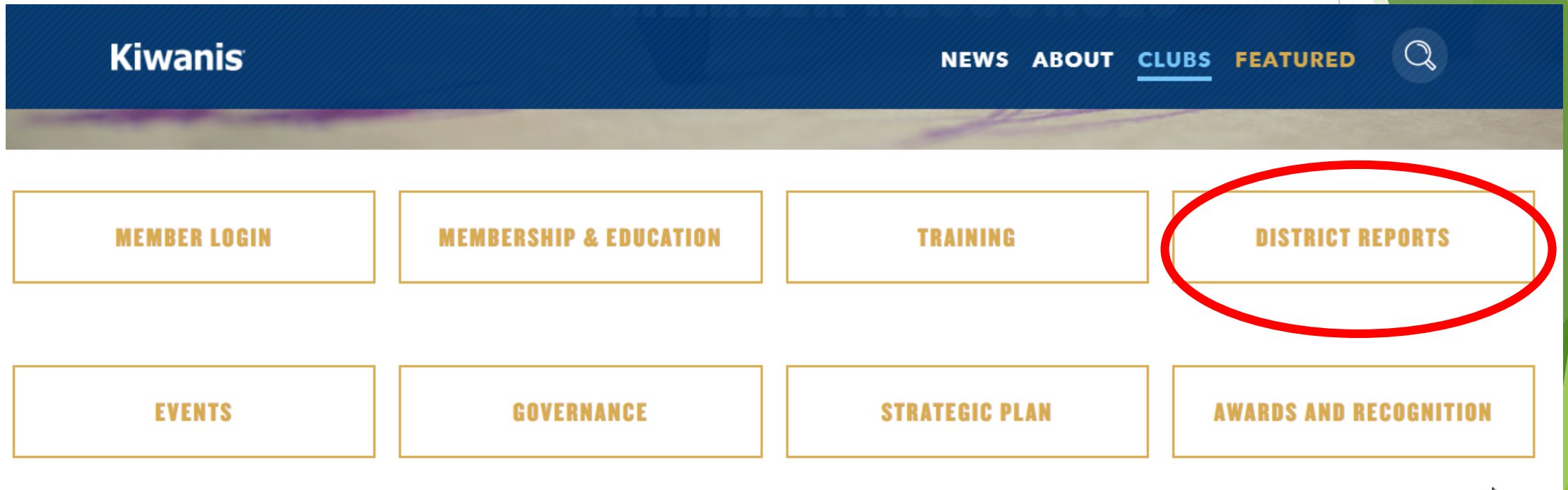
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**Club Meeting Locations**

Download district or division meeting locations

[Go](#)

- Everyone has access to District Reports on the KI website



- You will be amazed at what you can see!!!

Access to items can be found on the ECC website on the Decision page under the “Resources” tab on the left



ABOUT KIWANIS ▾

DISTRICT ▾

RESOURCES ▾

SERVICE LEADERSHIP ▾

## MAIN MENU

Home

About Kiwanis ▾

District ▾

Resources ▾

Service Leadership ▾

2018 Convention

2019 Convention

## ECC Decision Page

Confused about where to find something? Need to take an action but don't know where to go to do it?

Please click on the suggestions below.

- [Secretary Dashboard](#)
- [Complete or View Monthly Report](#)
- [Health Card](#)
- [Add or Delete Members](#)
- [Leadership Online Education](#)
- [Club Members Roster](#)
- [Club Dues owing](#)
- [Update Members Information](#)
- [Register for District Convention](#)
- [Club Management](#)
- [Kiwaniis Foundation of Canada](#)
- [Kiwaniis International Club Locator](#)
- [Paid or Unpaid Dues](#)



## Club Presidents Access:

- There are 2 types of Presidents - Presidents who want to be both President and Secretary and Presidents who don't log into the system. Which are you???
- Only the Club Secretary can ADD/DELETE members and assign a member as a DELEGATE at convention.
- The President can ONLY VIEW the information
- Access is driven by the Club Secretary and KI Member Services Department
- The President is responsible for ensuring that the Monthly report has been completed and filed
- Best Practice is to distribute the report to club board and membership

## Secretary Access:

- All powerful! Most important member of the team
- Early access for the incoming secretary can be given if the current Club Secretary requests it to Member Services Department
- **REMINDER:** Need to go in and put in the Club Officers for the coming Kiwanis Year
- Go to <https://members.kiwanis.org> and log in
- You will be taken to the following screen







**Kiwanis** KEY CLUB



CKI  
Circle K International



Kiwanis  
**ACTION CLUB**



Kiwanis  
**Builders Club**  
Building Leaders



Kiwanis  
**K-Kids**  
Young Leaders Helping Others

**Sheila Donald**

Sarnia-Lambton Golden K

Sign Out

Pb

Portalbuzz



Me



Members



Secretary  
Dashboard



Club Bylaws



Education



**Sheila Donald**

Sarnia-Lambton Golden K(K13016) | Member ID: 000000700310 |

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](mailto:kiwanisone@kiwanis.org) for assistance.



Edit profile picture



Edit Profile



Choose Secretary Dashboard icon







Portalbuzz



Me



Members



Secretary  
Dashboard



Club Bylaws



Education

Sec. Dashboard

Member Admin

Monthly Report

Annual Report

Finances

## Sarnia-Lambton Golden K (K13016)

You have **80** members in your club.

Your club is ranked **58** out of **256** in your district for net growth (**net gain of 2 members**)

Your club is ranked **107** out of **256** in your district for percentage growth (**2.6000%**)

### Club Elections

2018 - 2019 (Current Year) ▼

Convention Delegate Form

President

Michael J Korol



mkorol@cogeco.ca



President-Elect



### Club Information

Charter Date

1/16/1990

Division

K2104

District

K21



Membership

Mr Richard C Felton	rcdickfelton@gmail.com	
Secretary		
Sheila A Donald	s.donald@cogeco.ca	
Assistant Secretary		
Ms Anne Denman	annedenman01@gmail.com	
Treasurer		
Mr Wayne R Scarrow	wscarrow1@cogeco.ca	
Membership/Growth Committee Chair		
Mr Archie Kerr	aakerr48@gmail.com	
Membership/Growth Committee Chair		
Mr Dave Marshall	dmarshall26@cogeco.ca	
Club PR and Marketing Chair		
Mr Robert W Lutz	kiwanisbob@bell.net	
Club PR and Marketing Chair		

#### Club Signature Project



##### *Lochiel Kiwanis Community Centre*

This project was started in 1985 as a joint venture with the City of Sarnia. The Lochiel Kiwanis Community Centre is home to twelve community minded organizations who maintain office or programspace in our facility: Sarnia Kiwanis Foundation, Boys & Girls Club, St. Clair Child & Youth Family Drop In Centre, Organization for Literacy in Lambton, Sarnia Organ Donor Awareness (SODA), Yoga Bodhi, Great Lakes Dance Academy, Taoist Tai Chi Society, New Beginnings Stroke Recovery, Assisted Living South Western Ontario and the Unitarian Fellowship. Members of the Sarnia-Lambton Golden K Kiwanis Club participate on the Board of Directors that oversee the day to day operations of the Centre.

#### Club Website



<http://www.SarniaKiwanis.com>

#### Secondary URL (Facebook, Twitter, etc.)



☐ Our club has received Youth Protection Guidelines training.

## Sponsorships ?

<div><div></div><div>P.E. McGibbon Public School (B05461)</div></div> <div><div></div><div>bouchetteMJ@gmail.com</div></div> <div><div></div><div>Background Check Status</div></div> <div><div></div><div></div></div>	<div><div></div><div>Mr Murray Bouchette</div></div> <div><div></div><div>bouchetteMJ@gmail.com</div></div> <div><div></div><div>Background Check Status</div></div> <div><div></div><div></div></div>
<div><div></div><div>Great Lakes Secondary School (H90050)</div></div> <div><div></div><div>Djloucks@cogeco.ca</div></div> <div><div></div><div>Background Check Status</div></div> <div><div></div><div></div></div>	<div><div></div><div>Mr Dennis A Loucks</div></div> <div><div></div><div>Djloucks@cogeco.ca</div></div> <div><div></div><div>Background Check Status</div></div> <div><div></div><div></div></div>
<div><div></div><div>Sarnia-Lambton (D00701)</div></div> <div><div></div><div>rcfdickfelton@gmail.com</div></div> <div><div></div><div>Background Check Status</div></div> <div><div></div><div></div></div>	<div><div></div><div>Mr Richard C Felton</div></div> <div><div></div><div>rcfdickfelton@gmail.com</div></div> <div><div></div><div>Background Check Status</div></div> <div><div></div><div></div></div>

## Support ?

Send a message to your District Secretary. To contact Member Services, please use the chat bubble found in the bottom right hand corner of your browser.

## Meeting Locations

Add location



### Meeting location



Lochiel Kiwanis Community Centre  
180 N College St  
Sarnia, ON N7T 7X2  
CAN

Day: TU  
Time: 9:30 AM



Is this pin in the incorrect location?

- Key things to remember -
- Choose the correct year when updating Club Officers after your club conducts it's elections
- Once you change the year, the screen will have no officer listings

President



President-Elect



- Click on the + icon to add the new person
- Do this for all positions listed

- Don't forget about your ribbon at the top of the same screen - use it to get access to Member Admin, Monthly Report, Annual Report and Finances
- Important information is sometimes shown in **RED** at the top of a section
- Please take the time to read it!
- **PLEASE NOTE**: A full set of instructions will be sent out to all Club Secretaries by DST Jim Steele prior to October with specific instructions and points for clarification you need to remember regarding the monthly report
- Please take the time to read it!

- Lots of different access points to get to the same screens
- Develop your own choice
- If lost, ask for help! It can get very confusing!



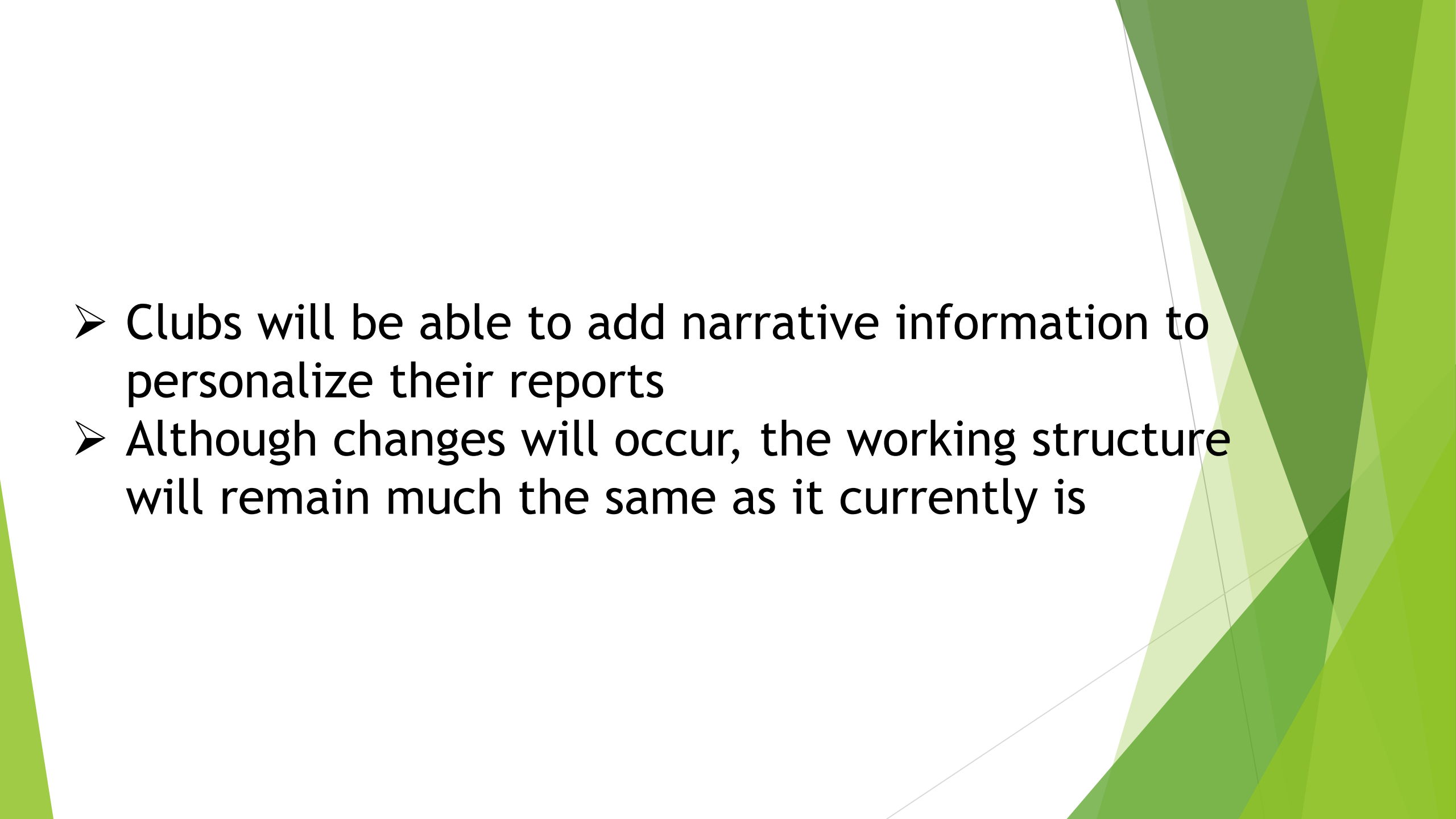
What's coming in the future???



Remember our EC&C Club Health Card???

- Launch of a new KI Monthly Report Oct. 1, 2019
- Support resources at launch - comprehensive user manual and video tutorial
- Return of the Club and District Health Dashboard to show how each is progressing month to month
- Approximately 30 questions eliminated
- Approximately 12 questions will be listed as “annual” questions
- May questions will have default data inserted from KI database (SLP clubs sponsored, new members etc.)
- These are highlighted on the Dashboard
- Questions will be revised for clarity or will have info icons available - help explain why the data is being gathered



- 
- The background of the slide features abstract, overlapping green geometric shapes, primarily triangles and polygons, in various shades of green, creating a modern and dynamic visual effect.
- Clubs will be able to add narrative information to personalize their reports
  - Although changes will occur, the working structure will remain much the same as it currently is

Club Dashboard									
Northwest Indy Club									
Dec 2018									
Beginning year membership 39									
	Club				District		North America		
	Mth	YTD	5 Year Avg		Average	Trend	Average	Trend	
<b>MEMBERSHIP</b>									
Current membership	42	●	8%	52	●	24	●	35	●
New members this month	1	●	3%	12	●	0.75	●	1.5	●
New members this year	3		8%		●	3.2	●	5.5	●
Average meeting attendance	22	●	-5%	19	●	22	●	18.0	●
Meetings held this month	4	●		3.5	●	2.5	●	3.8	●
Meetings with speakers	2	●	50%	2.9	●	3.2	●	2.8	●
Guests at meetings	3	●		1.7	●	0.7	●	1.2	●
Guest conversion to membership	1		33%	9%	●	4%	●	1.1%	●
<b>SERVICE</b>									
Service projects conducted									
Total service hours									
Average hours per member									
Financial value of service hours	\$24.88/hour		(Independent Sector)						
Non-members involved									
Cooperative SLP projects									
Youth served									
<b>SERVICE LEADERSHIP PROGRAMS</b>									
Total SLP clubs	5	●	32%	3.8	●				
K-Kids	2	●		1.4	●				
Builders Club	1			1					
Key Clubs	1			1					
Key Club members	33								
OKI	0	●		1	●				
OKI members	0								
Aktion Clubs	1	●		0	●				
Aktion Club members	24								
Number of schools with Bug programs	3	●							
Number of schools with Terrific Kids programs	6	●							
<b>FINANCIAL</b>									
Fundraising events completed									
Funds raised - service									
Funds collected - administrative									
100% members gave to KCF	Yes	●							
<b>IMAGE</b>									
Facebook posts	3								
Instagram posts	1								
<b>CLUB</b>									
Inter club events									
Education completed (CLE)									
President	Yes	●							
Secretary	Yes	●							
Treasurer	No	●							
All background checks current	Yes	●				●		●	

➤ **Red** and **Green** dots will be replaced by up and down arrows



**Questions????**

Thank you for listening!  
I hope it has been helpful!

For a copy of this presentation please  
bring a thumb drive to the

District Office

[s.donald@cogeco.ca](mailto:s.donald@cogeco.ca)