



CIVITAN INTERNATIONAL

# TREASURER MANUAL

2021-2022



# WELCOME & THANKS

More than 22,000 people from around the world join together in the service, knowledge, and fellowship of Civitan, changing lives and communities along the way.

**You are a leader among them.** The single greatest factor in the success of a Civitan club is the effectiveness of the club leadership.

The role of treasurer is critical for the health and well being of your club or district. Knowing the financial status of the club/district enables the board to make informed decisions on projects, grants, gifts, fundraisers, etc. If your financial information is not current, the board's decisions may be delayed or faulty. Assume your responsibilities proudly, perform them competently, and your time as treasurer will be a period of fiscal stability for your club or district.

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# ROLES & RESPONSIBILITIES

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## **During your term as treasurer, you will:**

- Send statements and collect dues
- Understand the types of dues structures
- Assist in preparation of the club/district budget
- Manage financial accounts, deposit funds, and pay expenses
- Work closely with unpaid or delinquent accounts
- Maintain financial records
- File appropriate local, state, and federal tax forms (as may be required)

## THE VALUE OF DUES

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Before we begin talking about the specifics of dues, it would be helpful to remind ourselves of why we pay dues in the first place. Let's take a look at the value of Civitan membership. Paying dues to Civitan International gives a member:

- Affiliation with a credible worldwide non-profit with a specific mission
- The opportunity to be involved in fundraising for an international flagship project that changes lives every day – the Civitan International Research Center
- Use of a credible brand
- The opportunity to develop leadership skills
- The opportunity to be involved at higher levels than the local club
- The opportunity to mentor the next generation through Junior Civitan
- Insurance for activities including service projects and fundraisers
- Resources & tools to improve your service
- Support of International Headquarters
- And most importantly, the chance to be a part of something bigger than yourself

# COLLECT DUES

**Monthly or Quarterly, the treasurer should:**

- Mail or email dues invoices to members
- Work with secretary to ensure the mailing/email list is correct
- Collect and deposit dues into Civitan account

**Dues are based on the number of members on the roster at the end of the previous billing cycle**

- December 31, March 31, June 30, September 30
- The secretary should submit any roster changes to be received by Civitan International by these dates for the upcoming quarter's dues invoicing to be updated
- Postmark dates do not apply

**International Policy 1110****Procedure for Billing North American Clubs for Quarterly International Dues**

"Presently each Civitan club, which is active as of the billing date of each quarter, is billed for that quarter's dues based on the schedule of quarterly dues for each country. The dues for U.S. clubs and clubs-at-large are set with a minimum charter billing per quarter of \$150.00 or an amount equal to \$18.00 per member, per quarter (whichever is greater). Civitan International provides liability insurance coverage for all clubs located in the U.S. and that premium is paid at the beginning of the calendar year based on the number of members on record at the time of the billing. The liability insurance premium is also due and payable when a new U.S. member is added to the club roster at Civitan International. The Canadian dues deviations are outlined in another policy."

**International Policy Manual**

[www.civitan.org](http://www.civitan.org) > Resources > Member Center > Governance  
Password: Fellowship

**District dues**

Established by and billed per district governance documents

**Club dues**

Established by club bylaws and billed on a per member rate monthly, quarterly, or annually, according to club governance documents

**Total Dues to Invoice Club Members =  
Club Dues + District Dues + International Dues\***

*\*Many clubs may pro-rate the (\$3.50/\$5.50) liability insurance fee across monthly or quarterly billing, rather than billing annually in January.*

# DUES STRUCTURE

## International Dues:

- \$18.00 Full Dues - per member, per quarter
- \$9.00 Half Dues - per eligible member, per quarter
- \$0.00 Dues - exempt member, per quarter

## International Fees:

- \$3.50 Liability Insurance Fee - for all members, regardless of full, half or exempt dues, per year  
(billed in January)

## NEW FOR 2022! TAKE NOTE!

U.S. Clubs Liability Insurance Fee will change on January 1, 2022 Increases to \$5.50 per member, per year

## Half International Dues Per Member Per Quarter: \$9.00

A secretary may request a member be placed on half-dues status for the following reasons, per International Policy:

- Extreme hardship
  - *Reference Policy 0810.1*
- Full-time students
  - *Reference Policy 0806*
- Persons with developmental disabilities
  - *Reference Policy 0806.1*
- The club/district should not collect or keep any information regarding personal financial status, medical diagnoses, or specifics regarding a developmental disability.

## Persons eligible to be exempt from International dues:

- Member-in-Military
  - While on active duty
  - *Reference Policy 0313.3*
- Past International President
  - *Reference Policy 0905.9*
- Unemployed Civitans
  - Up to two years, if become unemployed while in club
  - *Reference Policy 0810*
- Life Club Members are NOT exempt from International dues. When a club makes someone a lifetime member, they choose to make them exempt from club dues, and to pay International dues on their behalf.
  - *Reference Policy 0313.4*

# OTHER FEES

Before a new member is added to your club, a new member addition form with payment must be received by International Headquarters.

## **New Member Fees – U.S.**

- \$18.50 for U.S. Clubs (through December 31, 2021)
- \$15.00 Initiation Fee + \$3.50 Liability Insurance

## **NEW FOR 2022! TAKE NOTE!**

- U.S. Clubs New Member Fee will change on January 1, 2022
- As of 1/1/2022, U.S. New Member Fee is \$20.50
- \$15.00 Initiation Fee + \$5.50 Liability Insurance

## **Member Reinstate Fees**

- \$8.50 for U.S. Clubs (through December 31, 2021)
  - \$5.00 Initiation Fee + \$3.50 Liability Insurance

## **NEW FOR 2022! TAKE NOTE!**

- U.S. Clubs Reinstate Member Fee will change on January 1, 2022
- As of 1/1/2022, U.S. Reinstate Fee is \$10.50
- \$5.00 Initiation Fee + \$5.50 Liability Insurance

## **District Insurance Fee**

- \$400 per district, per year
  - Billed in January to Districts, for District events

# SUBMIT DUES

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**International dues invoices are mailed to club billing contact along with a roster at the beginning of each quarter**

- October, January, April, and July
- Ensure the club/district billing contact on file at International Headquarters is updated and correct
- Dues invoices must be paid by the 20th of the billing month, or the club is considered delinquent
- When a club becomes delinquent, it is considered not in good standing per International Policy 0304

## **Dues Payments – Electronic**

- Pay using credit card, debit card, or e-check (ACH)
- Payments can be made electronically in the Member Center on [www.civitan.org](http://www.civitan.org).
- Be sure to include the invoice number and club name if paying electronically
- **Resource For You:** “How to Pay Club Dues Online”

## **Dues Payments – Physical**

- Pay using check or money order, and mail, along with a copy of your invoice to:  
Civitan International  
P.O. Box 130849, Birmingham, AL 35213-0849

# MANAGE THE BUDGET

## **Budgets should include:**

- All projected areas of income
  - Administrative and operating income
  - Project and fundraising income
- All projected expenses
  - Meeting spaces/rental facilities
  - Donations
  - Dues
- Ask any committees to submit potential income and expenditures for the upcoming year
- Ask for assistance in preparing the budget from your Budget & Finance Committee, board, or previous treasurers

## **Best Practice:**

- Assign account numbers to all line items including:
  - 100s for administrative/operating receipts
  - 200s for fundraising/service receipts
  - 300s for administrative/operating disbursements
  - 400s for fundraising/service disbursements
- If the budget does not balance between income and expenses, work with your committees to adjust the projected needs
- Monitor the budget and adjust as needed throughout the year
- Be sure the budget is approved by the board and shared with your club members

## **10-Step Model for Preparing & Managing a Budget:**

1. Identify your club's service areas and the goals for each area.
2. Determine the amount of money the club has available for the Civitan year.
3. Ask each committee for their tentative budget for the year.
4. Compare committee requests with total funds available.
5. Approve or amend the budget of each committee.
6. Use committee budgets & other administrative and operating costs to prepare final budget.
7. Share the budget with the board for their input or approval.
8. Remember, a budget is a planning tool and may be amended by the board at any time.
9. Review the budget regularly and stay familiar with its current status.
10. Report on the budget's status to the President/Governor and board.



# SAMPLE BUDGET



**CIVITAN CLUB**

**PROJECT BUDGET FY**

## PROJECT REVENUE

PROJECT -		\$	
PROJECT -		\$	
PROJECT -		\$	
PROJECT -		\$	
PROJECT -		\$	
PROJECT -		\$	
PROJECT -		\$	
PROJECT -		\$	

**TOTAL PROJECT REVENUE** \$

## PROJECT EXPENSES

PROJECT -		\$	
PROJECT -		\$	
PROJECT -		\$	
PROJECT -		\$	
PROJECT -		\$	
PROJECT -		\$	
PROJECT -		\$	
PROJECT -		\$	

**TOTAL PROJECT EXPENSES** \$

**NET PROJECT PROFIT/LOSS** \$

## DONATIONS TO CHARITY

CAUSE -		\$	
CAUSE -		\$	
CAUSE -		\$	
CAUSE -		\$	
CAUSE -		\$	
CAUSE -		\$	
CAUSE -		\$	
CAUSE -		\$	

**TOTAL PROJECT EXPENSES** \$

# SAMPLE BUDGET



## CIVITAN CLUB CLUB BUDGET FY

### OPERATING REVENUE

INITIATION FEES	\$	
CLUB DUES	\$	
DONATIONS	\$	
FUNDRAISERS	\$	
PROJECTS	\$	
MISCELLANEOUS	\$	
<b>TOTAL OPERATING REVENUE</b>	<b>\$</b>	

### OPERATING EXPENSES

DISTRICT DUES	\$	
INTERNATIONAL DUES	\$	
INSURANCE	\$	
MEALS	\$	
SOCIALS	\$	
TRAININGS (DISTRICT, INTERNATIONAL, OFFICERS)	\$	
CONVENTION TRAVELS (DISTRICT & INTERNATIONAL)	\$	
OFFICE SUPPLIES	\$	
CIVITAN SUPPLIES	\$	
LEGAL OR FINANCIAL FEES	\$	
RECRUITMENT	\$	
GIFTS, AWARDS, RECOGNITIONS	\$	
MISCELLANEOUS	\$	
<b>TOTAL OPERATING EXPENSES</b>	<b>\$</b>	

**NET OPERATING PROFIT/LOSS** \$

### OVERALL REVENUE & EXPENSES

Operating Revenue Total	\$	
Project Revenue Total	\$	
<b>TOTAL REVENUE</b>	<b>\$</b>	
Operating Expenses Total	\$	
Project Expenses Total	\$	
<b>TOTAL EXPENSES</b>	<b>\$</b>	

**TOTAL OPERATING/PROJECT PROFIT/LOSS** \$

# MANAGE ACCOUNTS

## As account manager, the treasurer will:

- Be a signer and/or have access to **bank account(s)**
- **Manage payment methods**
  - *(credit/debit card, checkbook, PayPal, Venmo, etc.)*
- **Intake and deposit** funds including dues and donations
- **Pay expenses** for the club/district
  - *For example, meeting costs, service project costs, fundraising event expenses, member costs to attend convention, etc.*
- **Manage reimbursement process** to members (if applicable)

## Good Practice: have at least two bank accounts

- ADMINISTRATIVE or OPERATING
  - *Administrative expenses of the club*
  - *Income from club dues, meals, and other membership fees*
- SERVICE or PROJECT
  - *Used for all service projects*
  - *Income from fundraising projects or designated contributions (donors or sponsors)*
- **FUNDS FROM A SERVICE OR PROJECT ACCOUNT SHOULD NEVER BE USED TO PAY ADMINISTRATIVE OR OPERATING COSTS**

# MAINTAIN FINANCIAL RECORDS

## Keep an accurate account of all funds received and spent

When receiving funds:

- Issue a receipt\*
- Make a note in your account of the amount received, from whom, and what account it is credited to

When making a payment with club/district funds:

- Require an invoice for payment or receipt(s) for reimbursement
- Make a note of how much was spent, what account it came out of, and what the payment was for

\*Reminder, as a 501c4 entity, a club or district may not issue receipts for tax acknowledgment purposes

# FILING TAX FORMS

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**The IRS requires all U.S. Civitan clubs and districts submit a Form 990 annually**

- Failure to file may result in revocation of federal income tax-exempt status
- The deadline for submitting the Form 990 is February 15 of each year for all clubs or districts whose fiscal year ends on September 30. If your fiscal year-end is different, your filing deadline will also be different.

**The Form 990 your club or district completes is dependent on your total gross receipts for the year:**

- Gross receipts less than \$50,000 file Form 990-N (e-postcard) online
- Gross receipts between \$50,000 - \$200,000 file Form 990-EZ
- Gross receipts exceeding \$200,000 file Form 990

## **Gross Receipts**

Total funds collected into the club/district accounts before expenses are paid

## **Resource for You:**

Filing a 990 FAQ

# MITIGATING RISK

**In the United States, there is limited liability protection under Civitan International's insurance plan. Covered parties include:**

- Civitan Clubs (but not Club Foundations)
- Civitan Districts (but not District Foundations)
- Junior Clubs
- Campus Clubs
- Club Members (but only with respect to their liability for activities on behalf of Civitan)

**To receive a Certificate of Insurance, email [insurance@civitan.org](mailto:insurance@civitan.org).**

**Q: Does Civitan General Liability Insurance cover all projects and events?**

**A: NO.**

Although coverage is intended to cover regular activities, there are exceptions and exclusions to the policy, and insurance protection should never be assumed. Always check with Civitan International before planning an event.

Exclusions include:

•Parades, carnivals, events involving inflatables, concerts, fireworks, shooting activities, activities involving watercraft, events involving contact sports (such as basketball, softball), rodeos or any activity involving live animals, political rallies, events with more than 2,500 attendees, events with alcohol provided by the club

**Resource for You:**

Liability Exposure & Risk Management FAQ

# MORE

## Tips, Reminders, Resources

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### **CIVITAN MEMBER CENTER**

- Every resource, form, logo, link you could ever need related to Civitan lives in an icon in the Member Center.
  - [www.civitan.org](http://www.civitan.org) > Resources > Member Center
- All president's training materials and resources:
  - [www.civitan.org](http://www.civitan.org) > Resources > Member Center > Leadership

### **CIVITAN CONNECT INTERNATIONAL NEWSLETTERS**

- Released twice per quarter
- One for all members & one for club and district officers
- It is your duty and responsibility as president to open and read these communications so you don't miss important information, promotions, and deadlines you and your club members need to know

### **CIVITAN CONNECT FACEBOOK GROUPS**

- There's one just for you!
- Search "Civitan Club Secretaries & Treasurers" on Facebook
- (There's one for all members too if you haven't joined that)

### **CIVITAN "TV"**

- Full library of Civitan and CIRC Videos for download and use
- [www.vimeo.com/civitaninternational](http://www.vimeo.com/civitaninternational)

### **There's always someone you can reach out to for help:**

- Former Club Presidents
- District Area Director
- District Governor
- Regional Director
- International Staff

# MORE

## Accessing the Member Center

WWW.CIVITAN.ORG > RESOURCES


[WHO WE ARE](#)
[WHAT WE DO](#)
[JOIN](#)
[RESOURCES](#)
[DONATE](#)
[SUPPLY HOUSE](#)


## RESOURCES > MEMBER CENTER

WELCOME TO THE MEMBER CENTER!

[PAY CLUB MEMBERSHIP DUES](#)
[PAY ASSOCIATE MEMBER DUES](#)

**INTRODUCING...CIVITAN INTERNATIONAL IMPACT AREAS!**  
Click here to learn more



### General Forms

Click here for membership applications, for basic forms, and calendar information.



### International Fundraising Events

Click here for information on club fundraising projects including golf, Civitan Fest, All In Summit, and



### Leadership

Click here for officer training information and to sign up for workshops.



### Governance

Click here for resources on IRS filings, International records, and liability insurance.

# CIVITAN GLOSSARY

*Do you know your ACB from your MCB? Or what this Helm thing really is? Learn the Civitan lingo here.*

**501c3**

A designation by the Internal Revenue Service (IRS) of the United States classifying an entity (club or district) as an organization organized and operated exclusively for charitable purposes that meet certain other requirements making it tax exempt under Internal Revenue Code Section 501(c)(3). Having this status allows you to issue tax acknowledgments to donors.

**501c4**

A designation by the Internal Revenue Service (IRS) of the United States classifying an entity (club or district) as an organization organized and operated as a civic or social welfare organization not organized for profit.

**990**

The financial filing due to the Internal Revenue Service regarding income of Civitan Clubs

**Accredited Club Builder (ACB)**

A Civitan who has completed a club building seminar is automatically on the list of accredited club builders. These Civitans, so designated, are eligible to qualify for the certified club builder program.

**Area Director**

A district officer accountable to the governor for the proper operation of the clubs in an assigned area. He or she provides whatever consultation and assistance is needed or required.

**Articles of Incorporation**

A set of formal documents filed with a government body to legally document the creation of a corporation.

**Associate Member**

Associate member status may be conferred upon any person actively seeking to be a member of Civitan International, but unable, because of geographic distance or other limiting circumstances to realistically belong to any particular Civitan club. An associate member shall pay international dues but shall have no voting rights and may not serve on a district board/committee, the international board or international committee.

**Builders of Good Citizenship**

The motto of Civitan International.

**Bylaws**

Bylaws are the rules and principles that define your governing structure. They serve as your club's architectural framework. Bylaws aren't required to be filed as public documents.



# CIVITAN GLOSSARY

**Charter**

A charter certificate signed by the international president, district governor, and executive vice president, with the seal of Civitan International affixed thereon, shall be issued to each club requesting same providing the club is located in a nation which has been open to extension by the international board of directors, has a minimum membership as defined in international policy and has met all the obligations and requirements set by the governance documents of Civitan International.

**Charter Surrender**

Charter surrender notification to Civitan International begins the dissolution process for a Civitan club. A charter may only be surrendered to International Headquarters, not a district.

**Candy Box**

This is one of Civitan's oldest and most well-known fundraising programs, which supports hundreds of international and local charity projects, and helps thousands of people with intellectual and developmental disabilities. 75% of candy box proceeds go to Civitan International, 25% of the proceeds are kept by the club and are only to be used to support projects which impact the I/DD community.

**Certified Club Builder (CCB)**

A certified club builder is a Civitan who has built a Civitan club by the methods taught in the club building seminar and the new club building manual.

**Civitan Awareness Month**

The month of April shall be designated Civitan Awareness Month. This special emphasis month is to observe Civitan's anniversary and its history while stimulating knowledge of Civitan and membership growth. Clubs are encouraged to participate in activities to promote Civitan's image in the community, such as a special anniversary program, signing of a proclamation by a city official, and/or a designed fund raising/service project.

**Civitan Connect**

Facebook groups specifically designed for officers and members to connect with other Civitans from around the world? These platforms are designed for you to join with those in similar positions to share ideas, resources, ask questions, brainstorm together and more!

**Civitan International Research Center (CIRC)**

The Civitan International Research Center is the facility funded by Civitans. Our commitment to the CIRC began when it opened in 1992 and we have donated over \$20 million dollars to support the important work there. The CIRC is a world leader in the research and treatment of Intellectual and Developmental Disabilities (I/DD) which impact the lives of one in six people worldwide. In addition to clinical research, Civitan scientists provide training and treatment through the Civitan-Sparks Clinics and the Civitan International Neuroimaging Laboratory. More than 160 scientists conduct research, therapy, and treatment under the CIRC banner.

# CIVITAN GLOSSARY

## **Civitan Magazine**

The official publication of Civitan International is named Civitan Magazine. Civitan magazine is released via email once per quarter.

## **Civitan Year**

October 1 – September 30

## **Civitans at the Helm**

The avenue individual Civitans, clubs and districts support the CIRC through philanthropy. Donations towards the breakthrough golf tournament, coin revenue, gifts in honor of Civitans, All in Summit and gifts designated to the CIRC all count towards CATH. Recognition levels are determined by each club's average donation per member. The levels are:

- Helmsman: \$10 per member average
- Navigator: \$25 per member average
- Captain: \$50 per member average
- Commodore: \$75 per member average
- Admiral: \$100 per member average
- Admiral of the Fleet: \$200 per member average

## **Clergy Appreciation**

Clergy Appreciation Week is a Civitan International service project that began in 1963. The annual week of celebration was inspired by an event from 20 years earlier, the story of the Four Chaplains. In 1943, four military chaplains, a Methodist minister, a Catholic priest, a Reformed minister, and a Jewish rabbi sacrificed their lives on the USS Dorchester by giving their life jackets to other soldiers on board the vessel. Clubs around the world continue to celebrate Clergy Appreciation Week in a variety of ways.

## **Club-in-good-standing**

A Civitan club in good standing shall be any duly chartered Civitan club which is: current in financial obligations to Civitan International and its district; has approved governance documents; is not delinquent in filing reports to Civitan International; is compliant and current with required tax and revenue filings as required by residing governmental agencies; and has completed current training and certification for its president, president-elect, secretary and treasurer.

## **Coin Box**

This program was adopted from the candy box program. It maintains the same tenants as the candy box just without the peppermint candy. 50% of proceeds stay with the club, and 50% of proceeds directly benefit the Civitan International Research Center.

## **Competitive Awards**

Civitan International conducts an annual program designed to recognize clubs and district for outstanding achievement in community service, promotion and awareness.

## **Creed**

The Civitan Creed is a set of beliefs or aims which guide the organization and its members in action.

# CIVITAN GLOSSARY

## **Distinguished Governor**

A governor of a Quality Achievement District may be recognized as a Distinguished Governor if the following is also completed: attendance at Governors-Elect Academy; achieved 75% or greater attendance for Governors Update sessions; attended the international convention during term in office; and be recognized for one area of growth as outlined in the current Quality Achievement Award application.

## **District**

Geographical areas defined in Civitan International policy. Districts are assigned to a Regional geographic area as defined in international policy.

## **EIN**

An Employer Identification Number (EIN) is a unique identification number that is assigned to a business entity so that it can easily be identified by the Internal Revenue Service (IRS). Although most Civitan clubs and districts do not have employees, it is considered a tax payer identification number and used in filing the annual 990.

## **Executive Master Club Builder (EMCB)**

A Civitan who has successfully built at least ten (10) new Civitan clubs.

## **Executive Vice President**

The staff of Civitan International is managed by the Executive Vice President who is employed by the International Board of Directors.

## **Fellows**

The Civitan International Fellows Program is a way to recognize Civitan leaders for their outstanding volunteer efforts, commitment to service, and excellence as a Civitan member. These donations support Civitan International's charitable mission through support of the Civitan International Research Center, the Shropshire Scholarship program, and Civitan International Headquarters. Your contribution to the Fellows program is tax deductible.

- Foundation Shropshire Fellow \$1,200 minimum \$300 minimum Junior Fellow
- Freedom Fellow \$1,200 minimum
- Builders of Good Citizenship Fellow \$5,000 minimum
- Sustaining Research Center Fellow \$2,500 minimum
- Research Center Fellow \$1,200 minimum \$600 minimum Junior Fellow

## **Finance & Operations Department**

Civitan International staff includes a Finance & Operations Department. This team handles all financial systems, the daily operations of International Headquarters, dues billing and risk management.

## **GE Academy**

Civitan International annually conducts a training academy for governors-elect in preparation to serve as governor the following year. Participation in this training academy shall be required of all governors-elect and this fact made known to all districts. The curriculum shall include a course of study to include growth and management of the district.

# CIVITAN GLOSSARY

**Giving Tuesday**

Giving Tuesday is the Tuesday after Thanksgiving in the United States. It is a national day of giving. Civitan, like many other non-profits, celebrates by offering matching gifts and other incentives to maximize giving. Our Giving Tuesday efforts usually support Civitans at the Helm.

**Golden Circle**

A club may be designated as a Golden Circle club whenever its membership total reaches or exceeds 30 members.

**Governor**

The governor shall be the chief executive officer of the district. He or she shall exercise general supervision over the affairs of the district subject only to the district board, the delegates to the annual district convention, and the international board of Civitan International. He or she shall further the purposes of Civitan International and the district. He or she shall promote the interests and coordinate the work of district officers and of member clubs within the district. He or she shall at all times act as a representative of Civitan International in all relations with member clubs in the district.

**Governor-Elect**

The governor-elect is responsible for becoming familiar with all district Civitan activities and to prepare for assuming the job of governor. He or she is to assist the current governor in every way possible to ensure the efficient operation of the district and to prepare for the orderly transition from one administration to another. Specifically, he or she shall assist the governor in the management of the growth and member retention program on the district level and shall operate under the direction of the district board of directors.

**Governor's Update**

Civitan International conducts an annual program for district governor to review district growth goals and objectives, reevaluation of strategies, and consider course corrections with a view to having all districts achieve Quality Achievement status. Recognizing that the task of serving as a district governor is critical to the success of Civitan International's mission, the Update shall include all elements critical for a successful year.

**Home Club**

A member of Civitan International may belong to more than one club. Members in multiple clubs should designate one club as their "home club". A home club will be considered that individual's primary membership for purposes including but not limited to: club-wide mailings including recognition items, membership anniversary records, publication listings such as sponsor-a-member contest report, magazine or other print media listings and photo captions, and philanthropic recognition and credit given to clubs for member giving.

# CIVITAN GLOSSARY

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**Honor Club**

Civitan International annually recognizes clubs achieving a minimum level in the areas of: club recruitment and retention; service and fundraising projects; knowledge through programs and speakers as well as attendance at district and international gatherings; fellowship; club administration/marketing/recognition; and Civitan International philanthropic support activities. Higher levels of Honor Club may be achieved through additional efforts like chartering a new club.

**Honor Key**

Clubs, districts, and Civitan International may recognize individual member achievement with an Honor Key. This recognition is the highest level bestowed on an individual on these levels.

**HOPE Award**

Presented every year to the club with the most participation and outstanding performance in the candy box program. The winning club receives a distinctive banner patch, as well as a \$1,000 contribution in its name to the Civitan International Research Center.

**Impact Areas**

Four sub-sets of Civitan's mission statement encouraging clubs to focus their activities on improving the lives of those with I/DD – Family & Community Support, Accessible & Inclusive Communities, Health & Wellness, Education & Employment

**International Board of Directors**

The governing and policy making body of Civitan International shall be a board of directors, which shall make all necessary rules and regulations for the governing thereof not contrary to the Articles of Incorporation and Bylaws of Civitan International. The Board of Directors of Civitan International shall direct, manage, supervise, and control the business, property, and funds of Civitan International. The Board of Directors may, by general resolution, delegate to the officers and to committees such powers as provided for in these Bylaws.

**International Convention**

The annual meeting of the Civitan membership is the international convention. Held yearly during the summer months, its purpose is to conduct the official business of the organization as well as develop the member experience and leadership. It is a time of celebration for the prior year's accomplishments, rally for the current year to finish strong, and announce plans for the upcoming year.

**International Headquarters (IHQ)**

The Civitan International Headquarters is located in Birmingham, Alabama, and provides support services to clubs in the areas of growth and expansion, leadership training, public relations, and fundraising.

# CIVITAN GLOSSARY

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**Junior Civitan**

Junior Civitan operates as a program under the authority of Civitan International. As Civitan International's longest standing program, Junior Civitan brings together thousands of middle and high school students across the globe in the name of service. Our hundreds of community and school-based clubs participate in service projects like school clean-ups, collection drives, awareness campaigns, and volunteer activities at local agencies or in their own schools and communities.

**Legacy Society**

Civitan's Legacy Society recognizes individuals who contribute to Civitan through a planned gift. Planned giving options include bequests, beneficiary designations of life insurance or retirement plan assets, charitable gift annuities, charitable trusts, and gifts of property. All members receive special recognition, including a lapel pin and an invitation to the President's Council Reception at international conventions.

**Light the Way**

The Civitan Light the Way campaign was created to help ensure the future of Civitan. All donations go into a separate cash reserve account for Civitan. Most non-profits have a cash reserve and it is a generally accepted practice in the non-profit sector.

**Major Gifts Society**

The Major Gifts Society program was designed as a meaningful way to recognize Civitan's highest-level donors who give important financial support to Civitan International. This recognition can only be attained through personal contributions of \$10,000 or more cumulatively.

**Master Club Builder (MCB)**

A Civitan who has successfully built at least five new Civitan clubs.

**Member Center**

Page on [www.civitan.org](http://www.civitan.org) with information, resources, forms, links, and tools for members and clubs

**Membership Department**

Staff department which supports and guides adult Civitan clubs, builds resources and tools, manages officer training, club governance, club records

**Mother Club**

The first Civitan club established by Dr. Courtney Shropshire in Birmingham, Alabama in 1917

**PDG**

Past District Governor

**Philanthropy Department**

This division of Civitan International handles all facets of giving. From programs that fund the Civitan International Research Center to club fundraising questions, look no further than the Philanthropy department.

# CIVITAN GLOSSARY

## PIP

Past International President

## Policy

Civitan International as well as some clubs and district maintain policies which are governance documents that accompany articles of incorporation and bylaws. Policies may be amended by the board of directors at any time. Policies are principles intended to chart a course of action. Policies should be broad enough to permit the administration sufficient flexibility to administer the intent of the policy and narrow enough to give clear guidance. Policies are guides for action by the administration, which then sets the rules and regulations to provide specific directions to the administrative staff and all levels of Civitan.

## Powell, Craig, M.D., Ph.D.

Director of the Civitan International Research Center at the University of Alabama in Birmingham, Alabama

## President's Council

This annual giving program helps to support the work of Civitan International by underwriting the expenses of the planned giving and philanthropy department. This support comes back to Civitan as event sponsorships, legacy gifts, major gifts and other essential fundraising income. These gifts provide the basis for stable funding for our charitable activities. Members of the President's Council make a monthly donation, with membership levels starting at \$10 per month or annual donation starting at \$120. Donations are tax-deductible for United States citizens. European Civitans who give to President's Council directly support the CIRC.

## Quality Achievement Award

Civitan International annually recognizes districts achieving a minimum level in the areas of: district management and meetings; growth and development; service and awareness; trainings and meetings; and philanthropic support of international events and programs.

## Regions

Civitan Regions consist of the districts located within the territorial limits designated by the International Board of Directors for a particular region. Regions have limited operational status, if any, but shall exist simply to provide a geographical division for the purpose of representation to the Civitan International Board of Directors in that directors shall be elected by a region's membership. The territorial boundaries of the regions shall be as outlined in the policies of Civitan International.

## Regional Director

There shall be a Director elected to the Board of Directors of Civitan International from each of the regions as representation for the geographical area as established by the International Board of Directors.

## ROA (Request for Organizational Authority)

When a new club is being considered, a Request for Organization Authority must be submitted to the district and Civitan International for approval. This request should be submitted immediately following the first meeting of a group considering the creation of a new club.



# CIVITAN GLOSSARY

## **Senior Executive Master Club Builder (SEMCB)**

A Civitan who has successfully built at least fifteen (15) new Civitan clubs

## **Shropshire**

Dr. Courtney W. Shropshire is the founder of the Civitan organization

## **Sponsoring Club**

When one Civitan club sponsors the creation of a new Civitan club, the originating club is referred to as the sponsoring club.

## **Sponsoring Member**

When a Civitan sponsors a new, reinstated, or transfer member into a club, this Civitan is referred to as the sponsoring member.

## **Staff/Board Invitation Request**

To request a member of the Civitan International Board or Staff to visit a club or district meeting, in-person or virtually, complete this form found on the General Forms web page.

## **Supply House**

The Civitan Supply House is the official provider of Civitan International emblematic items made available for purchase by club members, clubs and districts.

## **The Foundation for Children with Intellectual and Developmental Disabilities (FCIDD)**

The Foundation for Children with Intellectual and Developmental Disabilities was founded for the purpose of providing support to organizations that serve individuals with intellectual and developmental disabilities in Baltimore, MD in 1950. Tom McNulty, a prominent Baltimore citizen, was invited to speak to the Civitan Club of Baltimore about his goals for aiding children with disabilities. Tom and his wife Mary had a son, Tommy, who was born with Down Syndrome. Going against societal norms at the time, the McNulty's decided that young Tommy would not live his life in an institution, that he would be a pioneer in helping children, and that what they would do for Tommy, they would also do for others. Tom spoke to the Civitans of the many ways in which assistance could be rendered to promote the general welfare of children with disabilities. Tom's vision to help children culminated in the creation of the FCIDD. The foundation supports the work of Civitan in many ways, funding grants for projects executed by the clubs in the Chesapeake district, match all Civitans at the Helm donations up to \$200,000 each year, and fund a scholar at the Civitan International Research Center.

## **VIP Program (Very Important Part)**

Civitan International has designed the VIP program especially for newer members. Pursing the VIP designation will quickly involve a new member in the various aspects of the Civitan organization, gaining knowledge of fundraising events, community projects, district meetings, and much more. Becoming a VIP will give a new member a head start on involvement with Civitan.

## **Walk & Roll for Research**

Walk and Roll is a hybrid fundraiser for the Civitan International Research Center. Participants can host their own Walk & Roll events in their community or walk with other Civitans during the International Convention.



# JUNIOR CIVITAN GLOSSARY

**All In Summit**

The All-In Summit brings together Junior Civitan's international and district leaders in support of people living with intellectual and developmental disabilities. Junior Civitans have incredible passion and fundraise thousands of dollars for the Civitan International Research Center. They also participate in leadership workshops and a large service project. Please support the All In Summit participants!

**Club Advisor**

An adult (typically a school employee) who oversees the Junior Civitan Club directly. This person does not have to be a Civitan Member however most sponsoring Civitan clubs to invite this person to join their Civitan club.

**Community Club**

Some Junior Civitan Clubs are not affiliated with any one school and serve students from multiple schools, or homeschooled students. These clubs are referred to as community clubs and are typically advised by a member of the Sponsoring Civitan Club.

**Deputy Governor**

The “second in command” of a Junior Civitan district. Junior Civitan international, districts, and clubs don’t have a Governor Elect or President Elect position as the Civitan organization does.

**Dance-a-thon**

Junior Civitan International fundraising event that takes place at International Convention. Students raise money to participate in a dance-marathon type of event and proceeds benefit the CIRC.

**Hold The Charter**

An option for Junior Civitan clubs who are not able to be active in any particular year but do not want to fold the club. Reasons could be things like: a change in advisor, school restrictions due to COVID, natural disaster altering the school year (hurricane, tornado, etc.). Instead of paying dues that year, the club or Sponsoring Club would pay a fee to International and the District to “hold the charter” until the next school year when they can resume activity. They can only do this for ONE year—not multiple years in a row.

**Junior Civitan Year**

July 1 to June 30

# JUNIOR CIVITAN GLOSSARY

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**Lieutenant Governor**

A position at the district level who is in charge of a group of clubs in the district and they act as a liaison between the clubs and the district.

**Public Relations Coordinator (PRC)**

A district and club office in the Junior Civitan program. This person handles all marketing, social media, newsletters, etc. of the club or district.

**School Club**

Most Junior Civitan Clubs are formed withing a particular school. We refer to these clubs as our school-based clubs.

**Sponsoring Civitan Club/District**

Each Junior Civitan Club must have a sponsor to be chartered. Mostly, this is a Civitan club in their area but Junior clubs can also be sponsored by their district if a Civitan Club in their area is non-existent.

**Sponsoring Club Liaison**

A Civitan club member appointed to be the liaison between their Junior Civitan club and the Civitan Club.

**Vice President**

Same as above, this is the “second in command” as opposed to a club president-elect or the international president elect.

# NOTES

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**I AM CIVITAN:**

as old as life, as young as the rainbow, as endless as time.

**MY HANDS**

do the work of the world and reach out in service to others.

**MY EARS**

hear the cry of children and the call throughout the world for peace, guidance, progress, and unity.

**MY EYES**

search for others to join in the fellowship and service of Civitan.

**MY MOUTH**

utters the call to daily duty and speaks prayers in every tongue.

**MY MIND**

teaches me respect for law and the flag of my country.

**MY HEART**

beats for every friend, bleeds for every injury to humanity, and throbs with joy at every triumph of truth.

**MY SOUL**

knows no fear but its own unworthiness.

**MY HOPE**

is for a better world through Civitan.

**MY MOTTO:**

builders of good citizenship.

**MY BELIEF:**

do unto others as you would have them do unto you.

**MY PLEDGE:**

to practice the Golden Rule and to build upon it a better and nobler citizenship.