Kiwanis Club-Opening Tool - User Guide

What's your formula for sharing Kiwanis? If it involves sharing your Kiwanis experience with everyone you can reach, bringing Kiwanis to a new community could be a worthwhile activity for you. Opening a club is a rewarding way to tell your Kiwanis story—and leave behind a legacy in a new community for years to come. To assist you, we have created a tool that helps you connect with other volunteers and potential members as well as gather information and resources.

The Kiwanis club-opening tool is a step-by-step guide empowering you to focus your energy in the right direction at the right time—keeping you organized and on track as you help create strong, active Kiwanis clubs.

*Note: This guide is NOT for opening a Service Leadership Program club. If your club would like to sponsor an SLP club, please access the charter toolkits at www.kiwanisone.org/charter.*

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Once the process of creating the club bylaws has begun, the status of this step will be marked as “Pending.”

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Overview

The Kiwanis club-opening tool has three main components: Prepare, Invite and Organize.
At a glance, these sections will allow you to:

1. Prepare

The Prepare section of the Kiwanis club-opening tool helps you determine whether a potential site is viable, then form a club-opening team and strategy for getting started.

In this section you will:

- Name the potential site
- Choose the location
- Form the leadership and support team
- Select a sponsoring club
- Download support resources
- Order a club-opening kit

Once you have completed these items, clicking the Save and continue button alerts The Formula volunteer leaders and Kiwanis International staff that you are considering bringing Kiwanis to a new community.

2. Invite

The Invite section of the Kiwanis club-opening tool helps you form a team of individuals with the skills and abilities to successfully open a new club, and then identify and invite potential members. This second component will enable you to:
• Compile and save a list of club-opening team member names and email addresses
• Create a training schedule for the club-opening team
• Schedule training events
• Create a schedule with dates and times for members of the club-opening team to begin inviting potential members
• Identify and track potential members, utilize a communications log
• Convert potential members to paid members

3. Organize

The third component of the Kiwanis club-opening tool will guide you through the process of establishing and organizing your new club, including required paperwork (now online) and your club’s official records and member data.

Starting with a pre-organization checklist, this section will lead you through:

• Submitting your new-club information form
• Submitting your Permanent organization roster
• Sending a charter payment
• Initiating the process of submitting your club bylaws
• Recognizing those who helped open the new club

The Organize section replaces the paper forms and manual approval processes previously used by Kiwanis International’s Member Services department. Now all submission requirements for the final steps of the process can be completed online.

Getting started

Logging in

To access the Kiwanis club-opening tool, log in with the email/username and password you use to access other reporting tools. You may login at www.kiwanis.org/formulatools.
IMPORTANT: The Kiwanis club opening tool will only work with your local club login. If you are a division or district officer, please select your local club from the organization drop-down list during login to access the Kiwanis club-opening tool.

Once you are logged in, you will see The Formula icon on the left side of the screen in the menu. Click this icon to access the Kiwanis club-opening tool.

**The Formula icon**

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**Prepare**

The Kiwanis club-opening tool launch screen

Notice that the boxes to the left of Prepare, Invite and Organize are unchecked, meaning they have not been completed or approved.

Click the Prepare button to get started. The following fields will appear below a welcome message:
Fill in the preliminary information for your site. All fields are required. **You may change this information later** on in the process before the club is officially organized.
Once the information has been entered, click the Save and Continue button. This will save the site information and inform The Formula leaders and Kiwanis International staff that you’ve started a new site.

**How to open multiple clubs at the same time**

As you become more familiar with the process of opening clubs, you may wish to identify and work on several potential sites at once. You may enter multiple potential sites into the Kiwanis club-opening tool. Any additional site you add and save will show up on a drop down list found at the top right corner of your screen.

*Tip: If you run into an issue and cannot proceed at any point in the process, please report the problem to TheFormula@kiwanis.org with as much detail as possible. Starting over will create multiple new sites with the same name.*

You may work on any club you have previously submitted by clicking on the drop down menu and selecting the appropriate club site from the list.
Once you have selected the site name, you may continue working where you previously left off.

Clicking the Save and Continue button also will open the next part of the Prepare section where you will begin to form the club-opening team.

The first step in the process of opening a club involves identifying a potential site, forming your club-opening team and exploring your community.

*Scroll down to see an example.*
Club Opening Tool

Step-by-step guide

The steps outlined below will move you through the required stages of opening a great club. Click on a section to expand and view the tools. Some sections are greyed out (locked) until you complete certain sections. As you go along, you may save your data and return later to continue. Please complete these steps in order.

If you need assistance at any time during the process, please contact TheFormula@kiwanis.org

You are currently opening this club: new club

**Prepare**

Form your team Resources

Now’s the time to choose the team you’ll be working with.

The default location of your new club site in our system is the district in which the site creator is a member. If you are opening a club in another district, select that district from the district dropdown menu.

Then select the club counselor, sponsoring club and club opener you’ll be working with. If the name of your desired club counselor or club opener does not appear, please email TheFormula@kiwanis.org to verify that they are registered in our system. If you don’t know any of this information at this point in time, that’s okay. You can return to this screen to fill it in later.

**Form your team**

District/Division

Indiana Capital

Lieutenant governor Thomas Ewbank thomas@example@yahoo.com Phone unknown

Club counselors

Find counselors Search by last name Add

Sponsors

Indiana Capital Indianapolis

Club opener

Find club opening Search by last name Add

Save and Continue
Form your club-opening team

1. The district and division of the new site location will automatically appear, but if you are opening a club in another district, select that district from the dropdown menu. The name, email address and phone number of the lieutenant governor for that area will appear.

2. Select a club counselor for this new site by typing the last name of the individual into the box. The box will auto-populate with matching or near-matching names. Select the desired name from the list.

3. **Be sure to click the Add button once a name is selected.** Clicking the Add button will bring the name, email address and phone number of each team member into view.

4. If the club counselor you’re looking for does not appear in the list, you can leave it blank and request help via TheFormula@kiwanis.org. These fields are not required to Save and Continue.

5. Follow the same process to choose sponsoring club(s) and any additional club openers to join your team. Remember to click the Add button to bring each name and contact information into view.

*Scroll down to see an example.*
Click Save and Continue to capture your selections and assign them to the potential site. You will now be directed to a resource page.
Resources

The Resources portion of the Prepare section provides you with resources that will help you understand the roles of your team members, explore your potential community, train your team and identify a sponsoring club. We also offer several resources that will be useful to you once you begin inviting potential members. The files offered here serve as an outline/reference of the responsibilities and commitments of the various members of the club-opening team.

Click any of the resource links to open a PDF file for that resource, or click the Download all link to download all resources at once to your desktop or device.

Downloadable files include:

- Community exploration
- Quick-start guide for club opening
- Club opener position description
- Club counselor position description
- Lieutenant governor position description
- Sponsoring a new Kiwanis club
- Corporate membership guide
- Quick-start guide for counseling new clubs
- Quick-start guide for counseling existing clubs
- New-club fees worksheet
- Checklist for club-opening team

You also may order a club-opening kit by clicking the Order a club-opening kit link. The club-opening kit contains promotional brochures and membership applications that will help you introduce Kiwanis professionally and concisely. It will be mailed to you at the address you provide.
The second step of the club-opening process involves inviting potential members to join your new club.

This step of the process includes training team members and identifying potential members and community leaders and inviting them to join the new club.

The Invite section has 5 parts:

- Stats: View the progress of opening your new club
- Make a schedule: Compile a list of club-opening team members, schedule a time for club-opening team members to be trained, and schedule times for club-opening team members to invite potential members
- Prospects identified: Add and view names of potential club members
- Members invited: List names of members converted from the potential member list
- Email: Send emails to club-opening team members, potential members or new (committed) members

We now explain each section in detail.

Stats

Clicking on the Invite bar opens a quick summary of the progress made and the information known about the stats on the new club.

At a glance, you can view the current number of club-opening team members, potential members, and committed members in this new club.
Make a schedule

This section allows you to add additional members to your club-opening team and provides tools for scheduling training for your team, as well as times and dates for members of the team to begin inviting potential members.
Click the action links to complete the necessary steps for training and planning with your club-opening team before you begin identifying and inviting potential members.

These four actions include:

**Form club-opening team**

When you click on the Form club-opening team link, you will be able to add new club-opening team members. Club-opening team members added here will help to visit potential members and invite them to join. If you are returning to this screen, you will see all the team members’ names, along with their saved contact information. You will be able to add, edit or delete information here as well.

Add any new club-opening team member names by clicking the + Add team member link.
Schedule club-opening team training

Click the link called Schedule club-opening team training. A box will appear where you may schedule a time and place for training and preparing your club-opening team members for how to address any concerns or questions likely to be raised by a potential member. Add any notes or reminders needed.

Once you fill in the details and click the Save button, the information will be saved under View team schedules.
View team schedules

This portion of the Invite section of the tool allows you to:

- Schedule a training for your club-opening team
- Schedule times and dates for members of the club-opening team to visit and invite potential members

All scheduled club-opening team trainings, and all scheduled times and dates for inviting potential members are listed in the View all schedules box.
Schedule times for inviting members

Generally over the course of a week, or at least a few days, members of the club-opening team will pair up to make one-on-one visits with potential members. You can use the Schedule times for inviting members section to assign specific members of the team to make visits on designated days and times. Clicking on this link shows the following screen:
Once all the details are filled in, click the Save button, then click Next to continue on to Prospects identified.
Prospects identified

As you begin to gather names of individuals interested in joining your new Kiwanis club, you will enter their contact information into the Kiwanis club-opening tool using the fields provided.

Click the Add potential member link (circled in red below) to add this information. As names are added, they will appear in this section.

The Communication log (also circled in red below) helps keep track of all interaction with the potential members. Click on Comm log to see all communication interactions with that potential member and enter new notes.

Check the Key prospect box if the potential member is a community leader or someone whose referrals can connect you with many other potential members.
Convert to member

As potential members make the commitment to join the new club, by completing a member application and paying the charter-member fee, they may be converted in the system from a potential member to a full member.

Click the Convert button next to their name to begin this process.

Converting a potential member to a paid member involves filling out a more extensive member profile and indicating if the individual has a previous association with Kiwanis or any Kiwanis Service Leadership Program club, such as Key Club.

Clicking the Convert link will open the window below.

Scroll down to see an example.
Click on the Add button for the correct selection.

If the potential member is a current member or former member of another Kiwanis or SLP club, you will need to know the district of their prior membership before proceeding with the membership conversion. For assistance, contact TheFormula@kiwanis.org.

Once you click the Add button, you will be asked to fill in any additional contact information for the new member.

When all of their information has been added, click the Submit button at the bottom of the screen.

Repeat the process with additional potential members as needed.
Members Invited

This section lists those individuals who have been successfully converted from potential members to paid members within the Kiwanis club-opening tool.

Member information may be edited or deleted in this area, and a history of communication contacts also may be viewed.

Email members and potential members

The email function of this portion of the tool allows you to keep in contact with members and potential members of the new club.

Choose which group you want to contact and select the correct tab: Prospects or Members.

Click the Compose Email link (circled below)

Clicking Compose Email will open up a box in which you may compose your email.

Select the names of the individuals you wish to contact from the Available Members column and move them to the Current Recipients column. Don’t forget to fill in your Subject line. You also may add attachments (such as an agenda for a pre-organizational meeting) smaller than 9MB.
Compose your email and click the Send button, or click Save to keep your email as a draft and send it later.

NOTE: The email tool saves your drafts, and also keeps a record of any emails already sent.
Organize

Once the Prepare and Invite sections of the Kiwanis club opening tool have been completed, it’s time to begin the Organize section.

You must complete some requirements before all the functions of this section become available to you. These are noted in each screen, where applicable. For example, the permanent organization roster is not available until 15 new members have been invited and converted.

This section covers:
- Pre-organization checklist
- New-club information sheet
- Permanent organization roster
- Charter payment
- Club bylaws
- Recognition

The Organize section replaces the paper forms and manual approval processes previously used by personnel in Member Services.

Pre-organization checklist

This checklist helps ensure everything needed for officially organizing a new club has been completed before proceeding further:

- Invite a minimum of 15 paid members before conducting meetings
- Conduct pre-organization gatherings
- Inform members about club structure
- Create Nominations & Bylaws Committee
- Conduct official organization meeting
- Develop an ongoing invitation plan
Once they have been completed and checked, click the Next button.

Clicking the Next button will send an email to the club counselor informing him or her that the official organization is underway.

**New-club information sheet**

This is where you will enter the official information for your club. Some of this information has already been entered for you from the Prepare section of the Kiwanis club-opening tool. All information may be edited in this section.

Items to be entered here are:

- The club’s official name (which may be different than the original site name)
- Club type
- Club president and secretary with full contact information
- Meeting location and time
- Date of the official organization meeting
Other items on this screen include:

- Club key number
- Official language
- Sponsoring club(s)

Remember to save your work as you go along, especially if you might step away from the computer for more than 20 minutes.

Submitting this information to Kiwanis International is the first step in making your club official.

Once all items are entered correctly, click the Submit button.

The new-club information sheet will be reviewed by Kiwanis International’s club processing representative and the club opener(s) will be notified when the club is approved.

Once approved, an email will be sent to you inviting you to complete your club’s permanent organization roster.

Scroll down to see an example.
Permanent organization roster

This part of the Kiwanis club-opening tool displays the club’s permanent organization roster—a list of the 15 or more members who were marked “convert to member” on the Prospects identified (potential members) list in the Invite section.

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Your permanent roster has been submitted. Additional members may be added to your permanent roster up until your charter presentation date. If you have already submitted your roster and need to add more charter members, please send that information to TheFormula@kiwanis.org.

<table>
<thead>
<tr>
<th>Fees paid</th>
<th>First name</th>
<th>Last name</th>
<th>Primary city</th>
<th>Primary state</th>
<th>Primary phone</th>
<th>Primary email</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Marilyn</td>
<td>Cooper</td>
<td>Indianapolis</td>
<td>IN</td>
<td>(317) 111-1111</td>
<td><a href="mailto:akjklj@kjkl.com">akjklj@kjkl.com</a></td>
</tr>
<tr>
<td></td>
<td>Frank</td>
<td>Daily</td>
<td>Indianapolis</td>
<td>IN</td>
<td>(317) 777-7777 EXT 777</td>
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</tr>
<tr>
<td></td>
<td>Karen</td>
<td>Indyclub</td>
<td>Indianapolis</td>
<td>IN</td>
<td>(317) 444-4424</td>
<td><a href="mailto:sdfkjl@kljb.com">sdfkjl@kljb.com</a></td>
</tr>
<tr>
<td></td>
<td>Sheila</td>
<td>Indyclub</td>
<td>Indianapolis</td>
<td>IN</td>
<td>(317) 777-5555</td>
<td><a href="mailto:dr@farber.com">dr@farber.com</a></td>
</tr>
<tr>
<td></td>
<td>Mike</td>
<td>Kramer</td>
<td>Indianapolis</td>
<td>IN</td>
<td>(317) 455-4554</td>
<td><a href="mailto:mike@kljklb.com">mike@kljklb.com</a></td>
</tr>
</tbody>
</table>
You can add more names to the roster before submitting the list to Kiwanis International as finalized. However, this list must be submitted to Kiwanis International within 30 days of the approval of the new-club information sheet. To add more members, please send their names and contact information to newclubs@kiwanis.org or go back into the Invite section to add and convert them.

When you have completed your permanent organization roster, click the Save button and then the Submit button at the bottom of the screen.

Once the list of names has been submitted to Kiwanis International, any necessary changes must be made by sending an email to newclubs@kiwanis.org. You may continue to add or edit names (via an email request) up until the night of the new club’s charter ceremony celebration.

Submit charter payment

The charter payment is the next step for your club as it moves closer to being officially organized. At this point in the process, you will pay the Kiwanis International fees for the charter members of your club.

This section will display the number of club members from your permanent organization roster and the per-member fee, along with the total amount due. If you notice any discrepancies, please send an email to newclubs@kiwanis.org.

Click the Generate invoice button at the bottom of the screen. This will create a charter club invoice which you may print and mail to Kiwanis International with a check.

*Scroll down to see an example.*
Club bylaws

Bylaws are each club’s agreement with Kiwanis International regarding basic standards required in order to belong to the organization. By adhering to the standards set in the bylaws, clubs are allowed to use the Kiwanis names and logos and tap into resources from the Kiwanis International Office. The bylaws also simplify club rules and allow more flexibility in club operations.

The club secretary and president are the only members who can create and submit the bylaws. Club openers may email those club officers notifying them that it is time to begin the process of creating the club bylaws. That message to the club officers also contains the link to the club bylaws tool that they will need to begin.
The email to the club officers will contain a link to http://www.kiwanis.org/kiwanisone/lead/club-bylaws where they may begin the process of creating the new club bylaws.

Once the process of creating the club bylaws has begun, the status of this step will be marked as “Pending.”

**Recognition**

This is where you will be given the opportunity to recognize the members of the club-opening team and sponsoring club who have help to open the new club.

_The Recognition portion of the Organize section is still under construction. It will allow you to record all volunteers involved with opening this club in order to appropriately track successes and recognize those individuals._

Read more details on The Formula recognition program at www.kiwanis.org/formularecognition.

END OF USER GUIDE