THE FORMULA

Workbooks for club openers and club counselors

LOVE IT. SHARE IT. LIVE IT.

Kiwanis UNIVERSITY
Workbooks for club openers and club counselors
Motto

Serving the children of the world

Defining statement

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

Vision

Kiwanis will be a positive influence in communities worldwide.

The Objects of Kiwanis

Object 1: To give primacy to the human and spiritual rather than to the material values of life.

Object 2: To encourage the daily living of the Golden Rule in all human relationships.

Object 3: To promote the adoption and the application of higher social, business, and professional standards.

Object 4: To develop, by precept and example, a more intelligent, aggressive, and serviceable citizenship.

Object 5: To provide, through Kiwanis clubs, a practical means to form enduring friendships, to render altruistic service, and to build better communities.

Object 6: To cooperate in creating and maintaining that sound public opinion and high idealism which make possible the increase of righteousness, justice, patriotism, and goodwill.
Contents

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49 Club counselor
91 Resources
167 Glossary
Dear participant:

Thank you for being a leader—and for participating in club-opening education. The information you receive during this session will help ensure your success as you begin your new role.

This workbook will be a crucial companion throughout the year. It’s your guide to information and inspiration. Take a little time to become familiar with it. Your experience with club-opening education is an essential first step toward a successful experience as a Kiwanis division leader. Please keep this workbook and refer to it throughout your tenure as a club opener.
Club opener

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Getting started

The objective of this education session is simple: to prepare you to open new Kiwanis clubs in your division.

We’ll accomplish this by addressing these questions:

• What is your job?
• How do you open a new club?

How will we know if we’re successful? This year, and each year of the initiative, your goal is to identify at least one new-club site in your division. But perhaps more importantly, you’ll be at the forefront of helping Kiwanis succeed by inspiring a renewed Kiwanis culture.
When you love something—when something really matters to you—you want to share it. You want other people to love it with you. You want it to be part of your life.

The Formula:

- Take something you love
- Share it with others
- Make it a part of your life

Love it. Share it. Live it.
Your job

Club opener position description

Preferred experience:
• Starting successful club-level membership efforts
• Opening long-lasting new clubs
• Using email, as well as calendar, spreadsheet, word-processing, presentation, and project-management software effectively
• Maintaining positive working relationships
• Enhancing others’ skills and productivity
• Managing conflict

Preferred attributes and skills:
• Positive and enthusiastic
• Committed to opening new Kiwanis clubs as a certified club opener
• Member of a club that has maintained or increased its membership
• Accomplished recruiter and motivator
• Effective team-building skills
• Supports and encourages other team members
• Diplomatic
• Firm, decisive and practical
• Organized
• Communicates effectively
• Focuses on innovation
• Educates others about Kiwanis
• Solves problems
• Exhibits sound judgment
Your responsibilities:

- Working closely with the lieutenant governor and certified club counselor to identify sites, develop strategies and create a timetable for opening new clubs
- Providing regular reports to the district chair and the lieutenant governor
- Participating in membership planning meetings with lieutenant governors at trainings and conventions
- Leading the club-opening process, in collaboration with the club counselor and lieutenant governor
- Acting as the ambassador for club organization
- Identify at least one club site in your division
- Mentoring additional club openers

Commitments:

- Serve as a club opener for a minimum of three years
- Travel to new club sites within your division
- Attend district or division events

This is a voluntary position. We appreciate your dedication to Kiwanis and your community. Thank you for all you do!

You were chosen! Be proud.

HOW DOES THE FORMULA APPLY TO YOU?

The Formula aims to achieve three specific goals:

- Develop a leadership structure with _______ additional leaders
- Expand Kiwanis’ impact to ______ new communities
- Inspire and equip clubs to be stronger by an average of ___ members
Our team

Here’s where you fit into the team.

- **The Formula committee**
  - Kiwanis International president and The Formula chairman
  - President-elect
  - Vice president
  - Supporting legacy leaders (2 past presidents)
  - Americas, Asia, Europe, Africa chairs (4)

- **District chairs (50)**

- **Lieutenant governors (875)**

- **Region chairs (11)**

- **Certified club counselors (1,750)**

- **Certified club openers (875)**

- **District governors (50)**

- **Club presidents (7,000)**

- **Club membership committee chairs (7,000)**

- **Traditional Kiwanis roles**
  - **The Formula roles**
Opening a new club

There are as many ways to open clubs as there are people and personalities. The two methods we’ve chosen to discuss have yielded a high success rate.

For a glance at the process, take a look at the newly updated Quick-start guide. It will provide you with a general overview of the club-opening process and help you stay on track once you begin. You can also find it at www.kiwanis.org/clubopener.

Be you! As you hone your own skills, adapt this process and make it your own.

Step 1: Prepare
Step 2: Invite
Step 3: Organize
Step 1: Prepare

Identifying potential sites

Many factors go into identifying a site for a new Kiwanis club. Site considerations include:

• Communities where Kiwanis and other service organizations are not meeting all of the needs of the community
• Communities where demographics have shifted and the population is interested in new service opportunities
• Communities with schools and no Kiwanis presence. Since Kiwanis is known for supporting schools and school children, these communities can provide a new club the opportunity to start a Service Leadership Program as its first service project
• Large communities with several schools and only one Kiwanis club
• Schools with Service Leadership Programs at the schools, but no sponsoring Kiwanis clubs
• Communities where there was previously a Kiwanis club

Are there other factors that could influence identifying a potential club site?

___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________

Tip: There are many types of Kiwanis clubs. Refer to the chart on pages 34.
Forming the team

You are not alone in your club-opening efforts. You have a team of people, including the lieutenant governor, a certified club counselor and a sponsoring club, working with you to achieve success.

Tip: The district chair and regional development strategists are great resources for you and the club-opening team!
Using the club-opening tool

Keeping track of big projects can be complicated. That's why we've developed a tool to help you stay on track as you open a club. The club-opening tool is an online resource that will help guide you through each step of the process, and help keep others updated on your progress. Use it to:

• Help prioritize potential communities
• Order and download resources to help invite members
• Report the milestones to district and international leaders

EXPLORING THE COMMUNITY

The next step is community exploration.

The goal of community exploration is simple. Collecting information that can provide a snapshot of the community will help you:

• Confirm that the site is viable
• Begin to consider how a Kiwanis club could benefit the community
• Prepare for meetings with community leaders

Work with your team to learn about each potential site. Using the Community exploration form in the Resources section, consider these questions:

• What other service organizations already exist in the community? When and where do they meet? What projects are they known for?
• What is the area's economic situation and demographics? Is the community changing or expanding? What resources could be helpful to learn about the community?

• Who can you identify as a key influencer?
ORDERING THE CLUB-OPENING KIT

Before you start inviting, make sure you have the marketing materials that you need. Order the club-opening kit from the club-opening tool at least two weeks before you plan to begin inviting members. You can download some of the resources for quick access.
Finding a sponsoring club

Talk to your lieutenant governor to find an existing Kiwanis club willing to sponsor the new club. A sponsoring club may have great insight as the club-opening team determines the needs of the community.

Sponsoring Kiwanis clubs agree to:

- Assist the club opener and the core team members with visits and invitations to prospective members (Recommended)
- Conduct inter-club meetings for the pre-organizational meeting(s), the official organizational meeting and the charter ceremony celebration
- Assist the club counselor and lieutenant governor in supporting the new club
- Assist with planning the new club’s first service project
- Continue to monitor the new club for at least one year and help it maintain the membership level necessary to remain in good standing with Kiwanis International and the district

What is an inter-club? An inter-club occurs when Kiwanis members visit another club or Service Leadership Program club.

<table>
<thead>
<tr>
<th>Number of Kiwanis club members</th>
<th>Number of members to have an inter-club</th>
</tr>
</thead>
<tbody>
<tr>
<td>Twenty or fewer (20&gt;)</td>
<td>Minimum of two (2)</td>
</tr>
<tr>
<td>Twenty-one (21) to thirty (30)</td>
<td>Minimum of three (3)</td>
</tr>
<tr>
<td>Thirty-one or more (31&lt;)</td>
<td>Minimum of four (4)</td>
</tr>
</tbody>
</table>

**Tip:** If you want to see what clubs already exist near your potential sites, use the Club Locator at www.kiwanis.org/findaclub.
Here are some potential questions that a sponsoring club may have:

**Q:** We’re busy trying to support our own community. Why should we help sponsor a new club?
**A:**

___________________________________________________________________________________________________
________________________________________________________________________________
________________________________________________________________________________
________________________________________________________________________________
________________________________________________________________________________
________________________________________________________________________________

**Q:** Why does this new club need a sponsor?
**A:**

___________________________________________________________________________________________________
________________________________________________________________________________
________________________________________________________________________________
________________________________________________________________________________
________________________________________________________________________________
________________________________________________________________________________

**Q:** What will our club have to do to support the new club?
**A:**

___________________________________________________________________________________________________
________________________________________________________________________________
________________________________________________________________________________
________________________________________________________________________________
________________________________________________________________________________
________________________________________________________________________________

Take something you love and share it. You’re helping create a legacy.
Q: How much will it cost our club to be a sponsor?
A: ________________________________
_______________________________
_______________________________
_______________________________
_______________________________

What other questions do you anticipate? What are your potential answers?

_______________________________
_______________________________
_______________________________
_______________________________
_______________________________
_______________________________
Meeting with community leaders

After your team agrees that a site looks like a good fit, schedule meetings with one or two of the leaders you’ve identified.

Go into your meetings with these goals:

• Learning more about the community and the person
• Getting referrals for potential members
• Gaining the person’s support for a new club—and perhaps a commitment to join

Meeting these people is much like meeting with prospective members in the future. But your goal for these meetings is not necessarily focused on inviting the community member to join.

Here are a few pointers to help you line up meetings:

• Use your team members to identify people who have a connection with the people you plan to meet.
• Call the person’s office to request a meeting.
• After connecting with a person, ask if you can use his or her name as a referral.
• Be persistent.
Step 2: Invite

When you talk to someone about Kiwanis, your goals are to:

- Create relationships, rapport and referrals within the community
- Continue discovering community goals and needs
- Introduce the community to Kiwanis and its benefits
- Invite the people you meet to support Kiwanis
- Invite the people you meet to join as a charter member

Developing rapport

The way you open a conversation with a prospective member is important. It’s all about building rapport.

1. Introduce yourself.
2. Mention the person who referred you (if applicable). Let him/her know you represent Kiwanis.
3. Ask, “Are you familiar with Kiwanis?”
   If Yes, ask, “How did you hear about us?”
   If “No,” briefly describe Kiwanis. Here’s one way to do that: “Kiwanis is a global organization of volunteers dedicated to improving the world one child and one community at a time. What differentiates us from other service organizations is our emphasis on youth. Our goal is to plant a seed in the mind of our youth by showing them the importance of service at a young age with the hope that they will develop an appreciation for giving back to the community.”

Building rapport is more than just what you say—it’s how you say it.

- Remember that the meeting is about the prospect.
- Look the person in the eye and firmly shake hands.
- Show him you’re genuinely happy to meet him.
- Ask questions, actively listen and show interest.
- Mirror his body language. For example, if he leans forward, do the same.

Tip:

Write your own description of Kiwanis. Your passion and enthusiasm will be more strongly communicated if it’s personal.
Introducing Kiwanis (simply)

- Have fun.

- Tell stories.

- Connect on a personal level.

Connecting to the community

When you enter a meeting, listen more than you speak. Ask open-ended questions and take notes. Many times, these conversations will give you a sense of what the community needs—and the role the person envisions himself playing to address it.

Tip: While you’re inviting new members, take note of members with exceptional leadership skills. You can invite them to be a club leader later.
Extending an invitation

Often when people learn they were recommended to you by an influential member of the community, they’re receptive to Kiwanis and what it has to offer. But your approach in introducing the organization—and in inviting them to join—ultimately dictates whether they offer you a completed membership application.

When you visit people with the objective of asking them to join a club, the goal is for them to make three commitments:

1. To agree to become a charter member
2. To sign a membership application to make it official
3. To provide payment to cover the charter member fee

Asking someone you just met to pull out a form of payment can feel awkward. Explain that:

- Kiwanis is a member-based organization that functions as a result of membership dues.
- To get started, a club needs at least 15 members. (Ideally, the club will be twice as big.) Submitting a complete membership application with payment ensures he or she is a charter member of the club.
- An initial payment helps establish the club’s bank account and pays the charter member fee.
- New-member payments aren’t processed until the club has elected a treasurer and opened a bank account. This will likely take at least two months.
- Dues are paid the following administrative year. These dues accord members tangible items like a Kiwanis magazine and liability insurance (where applicable) and enable the intangible experience of being a Kiwanian—friendship and networking with other service-minded people making a difference in the community.

Tip: Even if you cannot interest the person in becoming a member, the referrals you gather will help you open even more doors.

Tip: There are three types of charter members in a new Kiwanis club: dual member, seed member and a transferring member. See the definitions in the glossary on page 167.
Explaining next steps

Take a moment to set the scene for the prospective member by explaining the next steps of the organization process. Organizing the club requires at least 15 members—and the best way to identify who else could join is to ask the people you’re meeting with who else they know who has a heart for serving the community.

Questions/concerns

Some meetings will require fielding a lot of questions or concerns. Here are some suggested responses to several common ones.

**Concern:** I'm already a member of another service organization.

**Answer:** Compliment them for being involved in community service and tell them that we do not intentionally invite other organizations’ members. (However, it is permitted for them to be a member of Kiwanis as well as other civic organizations.) Then ask who else in the organization they would recommend you talk to.

**Concern:** I'm busy.

**Answer:** Be understanding and sympathetic. Ask if you could make a follow-up meeting at a time that's more convenient.

**Question:** How often does the club meet?

**Answer:** Tell them it is up to the group but it can range from weekly to monthly. Ask how often they would you like the club to meet.

**Concern:** I don't have the time to serve.

**Answer:** Successful businesspeople have to invest their time wisely. Since we only have 24 hours a day, we have to fill those hours with one of two things: The things we have to do and those we want to do. Today, your request is simple: Come and see if Kiwanis is something they want to fill their time with.
**Question:** What does Kiwanis expect from me?

**Answer:** Kiwanis, unlike many service clubs, only asks three things. One, be as active as you are able and willing. Two, we ask (as an organization funded by our members) that dues are paid on time. And three, within the first six months to one year of membership, we hope that you would bring a new member.

**Question:** How much of the money raised by the club will actually go to community service?

**Answer:** Kiwanis clubs return 100 percent of all the funds they raise to the community. Each club has two bank accounts. The first is an administrative account, which holds your dues. It pays for the expenses needed to run the club, things like stamps, office supplies and meals for guest speakers. The second is the service account. This holds all the dollars donated from club service and fundraising activities. We separate these because our bylaws state that these must be used for service activities.

**Question:** How much does it cost to join?

**Answer:** To join, we need a signed application and a form of payment made out to Kiwanis for $_____ to begin to populate the new club’s bank account and may be used however the club wishes. A portion of that money, called the charter member fee, goes to Kiwanis International to offer you a subscription to Kiwanis magazine, liability insurance and to help cover administrative expenses to train club officers and supply tools that will help your club function at its best.

**Concern:** That sounds like a lot of money.

**Answer:** There are other service opportunities that you can be part of that will make your community better with a few hours of service. But when you join Kiwanis, you're joining an organization of community leaders and friends dedicated to impacting their communities for the long term. What if there were no costs to join? Is there any other reason you would not want to be a part of the organization?
Method 1: The referral method

Often, it isn't what you know that makes a difference, but who you know: That's the logic behind the referral method. The referral method, which works particularly well in North America, involves meeting people and asking them for contacts. A referral can lead you to potential members.

Begin the process by talking to two leaders in the area—people who have their fingers on the pulse of the community and can help identify potential projects for the club.

These visits are generally made by the club opener and lieutenant governor before the rest of the team gets to work.

*Talk about Kiwanis youth!* Take the time to detail each Service Leadership Program. Be sure to touch on the programs’ character and leadership-building components, so the people you’re meeting with understand all Kiwanis does to support youth.

**TRAINING THE TEAM**

Either before or after getting referrals from community leaders, meet with the rest of the team members to train them. Particularly for those who have never participated in opening a club before, the goal is to make them feel comfortable and prepared to talk to potential members and address any comments or concerns they may encounter.

**Tip:** To become more familiar with these programs, see the overview provided in the Resources section.
LAYING THE GROUNDWORK

Share information about the community from your team’s community exploration. The more your team members know about the community and how to approach potential members, the better prepared they’ll be to invite others.

Focus on the following at your meeting:

- **Assign prospects.**
  - ______________________________________________________________________
  - ______________________________________________________________________
  - ______________________________________________________________________

- **Practice what to say.** Your team should feel comfortable:
  - Building rapport
  - Asking questions to determine how Kiwanis may fit the community
  - Addressing common questions or concerns
  - Extending an invitation to join
  - ______________________________________________________________________
  - ______________________________________________________________________
  - ______________________________________________________________________

- **Plan a follow-up meeting.**
  - ______________________________________________________________________
  - ______________________________________________________________________
  - ______________________________________________________________________

**Tip:** There’s a checklist for training the team in your Resources section on page 98.
MEETING WITH REFERRALS

Beginning a conversation by telling someone that a community leader suggested you reach out to them makes an impressive entrance.

After you introduce yourself, let the person know that:

• You’re a Kiwanian.
• You’re in the process of organizing a new Kiwanis club in the area.
• He or she was recommended for charter membership.

This is how the referral method continues: Except for the first one or two that start the process, every meeting occurs with someone who has been specifically identified by others in their community as having a heart for service.
Method 2: Group meetings

There is safety in numbers. Perhaps the comfort of knowing others are moved to act is one reason group meetings work well. This method is most often used in Latin America, the Caribbean and the Asia-Pacific region.

This method begins in a similar way. Although you first need to obtain the support of influential community leaders, rather than meeting with individuals on a one-on-one basis, the club-opening team plans a series of group meetings which are used as a vehicle to share the Kiwanis story and explain why a new Kiwanis club is needed. While a secondary goal of meeting with officials is still to obtain referrals, in this situation, people invite colleagues, family and friends from their networks to learn about Kiwanis. Guests who attend will do so because of their relationship with the person who invites them.

Before the meeting, make sure to:

- **Look for a location.**
- **Search for a speaker.**
- **Plan for success.** Set a well thought out agenda that helps you accomplish the goal of the meeting, which is to gain support from as many participants as possible. One way you might do this is:
  - **Welcome:** Involve the influential people in asking the audience to be open-minded and to endorse the speaker and Kiwanis.
  - **Brief introduction to Kiwanis (Keynote speaker)**
  - **The opportunities and benefits of Kiwanis service, focusing on the needs identified in the community exploration (Keynote speaker)**
  - **Sharing Kiwanis stories:** Enlist members of your team to engage the audience. The greater the connection the prospective members feel to the Kiwanis mission and the benefits of organizing one, the more likely that they’ll decide to become part of the club.

**Tip:** If you find that you need materials, videos, brochures or applications to provide your guests beyond what you received in the club-opening kit, contact Kiwanis International’s Member Services department by emailing memberservices@kiwanis.org or calling +1-317-875-8755 ext. 411.
• Invitation to join
• Question and answer period
• **Remind often.** Ask that the community leaders contact their guests a few days before the meeting to remind them of the date, location and time.

During the meeting:
• **Set the tone.** Designate a team to welcome guests and make them comfortable.
• **Spell it out.** Let the prospective members know how the lives of the children in the community can be improved by opening a Kiwanis club.
• **Be punctual.** First impressions count. Start and end on time.
• **Make it personal.** At the end of the meeting, divide up your team members so that someone can approach each prospective member to discuss the commitment to join the new club.
• **Follow up.** If you can’t get a commitment at the time of the meeting, ask when you may follow up to answer any questions. This is a good time to let them know what an asset they would be to the new club.

More likely than not, the club-opening team will need to conduct one or two more meetings to complete or exceed the minimum number of members required to organize a Kiwanis club.

**Tip:** Take a look at the PowerPoint “An introduction to Kiwanis” at www.kiwanis.org/clubopener. It’s a professional, compelling and attractive way to sell Kiwanis.
Online club opener resources

However you choose to invite them, once there is a significant number of members committed to the club, it’s time for the next step: organization. But first, you’ll need to download some additional resources from the club-opening tool and at www.kiwanis.org/clubopener.
Step 3: Organize

Introducing the club counselor

The success of your newly chartered club will depend on support and mentoring from the sponsoring club and the club counselor. Encourage the club counselor to become a familiar face to the members of the new club—beginning now. Work with him or her to deliver Kiwanis-related education materials and support in setting up a silent auction to help the club develop its visibility in the community—and its bank account. Take a look at the Planning a charter night silent auction tool in the Resources section to get started.

Getting down to business—and fun!

Although a minimum of 15 paid members are needed before the organization process can begin, aim to invite at least twice that many. Then the fellowship begins.

Schedule a series of meetings that allow the members to get to know each other and introduce them to Kiwanis. Invite the club’s new members to take part in pre-organizational meetings to prepare the club to be organized.

**Tip:** While the club counselor is involved throughout the club-opening process, this is the official point when they are asked to take a stronger lead in the process.
Pre-organizational meetings

Once the team has secured the minimum required number of members, it’s time to begin the process of organizing the club. Use pre-organizational meetings to prepare the club to be organized.

If you choose to hold two pre-organizational meetings, we suggest dividing the process up this way.

**MEETING 1**

- Encourage members to get to know one another.
- Offer an introduction to Kiwanis and explain how a Kiwanis club works. Refer to the new-club orientation program at www.kiwanis.org/newcommunities.
- Explain the process of forming the club.
- Encourage potential leaders to be on the nominating committee, which is chosen at the next meeting.

This is also a good time to discuss organizing a fundraiser, such as a silent auction, at the club’s charter night to help the club raise funds for its service account. Silent auctions promote the club in the community and increase attendance at charter night. Refer to the **Planning a charter night silent auction** tool in the Resources section.

**MEETING 2**

- Answer questions about Kiwanis.
- Discuss the agenda for the official organizational meeting.
- Informally appoint the members of the nominating committee, which handles club elections.
- Review key decisions to be made at the official organizational meeting.

**Tip:** Encourage charter members to invite potential members to the pre-organizational meetings.
These sample agendas may help you set a professional tone.

**Sample agenda for the first pre-organizational meeting**

1. Call to order
2. Introductions
   - Lieutenant governor and their responsibilities to the new club
   - Club counselor and how they will assist the new club
   - Club members in attendance
   - Guests
3. Meal (optional)
4. State the purpose of this meeting: to provide orientation of members to Kiwanis.
5. Follow the orientation outline provide by Kiwanis International.
   (A PowerPoint presentation and facilitator notes should be used.)
   Briefly cover these topics in the orientation presentation:
   - Club meetings
   - Member benefits
   - Member expectations
   - Community service projects (Have a speaker relate the advantages of specific service projects that were indicated in community exploration.)
   - Kiwanis International structure
   - Kiwanis International
   - District
   - Club
6. Review sponsoring club responsibilities to support new club.
7. Set the date for the next pre-organizational meeting.
8. Adjourn the meeting.

Download this document at www.kiwanis.org/clubopener.
Sample agenda for the second pre-organizational meeting

1. Call to order
2. Introductions
3. Meal (optional)
4. State the purpose of this meeting: to prepare for the official organizational meeting.
5. Continued club orientation on governance and club operations.
6. Briefly cover these topics in the orientation presentation:
   - Club governance:
     - Standard Form of Club Bylaws and Club Policies
     - Duties of club officers
     - Responsibilities of the club board of directors
     - Functions of club’s standing committees
     - Club administration and finance
   - Club operations:
     - Meetings and special events
     - Conferences and conventions
     - Service projects
     - Fundraising
7. Review the decisions to be made at the official organizational meeting.
8. Select the bylaws and nomination committee.
9. Set a firm date for the official organizational meeting.
10. Adjourn the meeting.

A second pre-organizational meeting is not a requirement. If the new club chooses to have just one organizational meeting, review both agendas to ensure all of the business is completed.

Tip: Once the pre-organizational and organizational meetings are scheduled, remind charter members of each meeting time and location. Consider a quick email or phone calls the day before too.
Determining a club type

At this point in the process, the identity of the club is starting to take shape. One signifier of that identity—the club type—appears on the club's official paperwork.

<table>
<thead>
<tr>
<th>Type of club</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Classic Kiwanis clubs</td>
<td>The traditional club in most communities today. The classic Kiwanis model is distinguished by a regular meeting time and place, club officers, a formal &quot;gong and gavel&quot; meeting structure, organized service projects and often a series of speakers and guests. Classic Kiwanis clubs satisfy members in many communities and can be adapted to diverse groups, corporations or specific professional societies.</td>
</tr>
<tr>
<td>Internet clubs</td>
<td>Offer flexibility for those who travel or can't attend traditional meetings. Club meetings are held in online chat rooms and officers use email, instant messaging, and texts to keep members connected.</td>
</tr>
<tr>
<td>Young professionals clubs</td>
<td>Meet the needs of younger members with busy lifestyles. These clubs offer flexible meeting schedules, hands-on service projects and social activities for members and their families. They use technology to assist in club operations and administration.</td>
</tr>
<tr>
<td>Golden K Kiwanis clubs</td>
<td>Offer service and fellowship opportunities for older and retired citizens. Since Golden K clubs are typically based in a retirement community and/or home, getting staff involvement and support is key.</td>
</tr>
<tr>
<td>3-2-1 Kiwanis clubs</td>
<td>Each month, members spend three hours performing service, two hours socializing, and one hour meeting. This provides a great option for members who want to meet less and do more.</td>
</tr>
<tr>
<td>Family clubs</td>
<td>Focus meetings and service opportunities around family participation. Members often include extended family and friends, and meetings usually involve kids and service.</td>
</tr>
<tr>
<td>Company-based clubs</td>
<td>Comprised of employees of a company or organization (i.e., a large company, hospital campus or university). The employer pays a flat annual fee based on the number of employees participating.</td>
</tr>
</tbody>
</table>
Organizational meeting

During the club’s first organizational meeting, club members get started with the business of the club. Here’s what they do:

• Choose the club’s official name.
• Set the amount for annual dues. (See the New-club fees worksheet in the Resources section.)
• Approve club bylaws.
• Elect club officers and the board of directors.
• Choose the date for the club’s charter night.

Here are some fast facts about this important meeting:

• The first board of directors meeting immediately follows the organizational meeting.
• Fifty percent plus one of the signed and paid members must be present to conduct the organizational meeting. For instance, if you have 30 individuals who have committed to becoming members, at least 16 of those members must be present.
• Conduct the first board of directors meeting immediately following the organizational meeting.
• Report the new club to Kiwanis International within 24 hours using the club-opening tool.
• Inform your district’s governor of the club’s organization. Tell him or her to expect an invitation to a charter ceremony in 4–6 weeks.
Sample agenda for the official organizational meeting

1. Call to order by presiding officer
2. Introductions
   • Visiting Kiwanians
   • Members of the new Kiwanis club
   • Guests
3. State the purpose of the meeting: to organize the new Kiwanis club
4. Introduction of the club opener by presiding officer
5. Appointment of a temporary secretary by presiding officer
6. Reading of the charter member names by temporary secretary
7. Presentation of Kiwanis lapel pins by lieutenant governor
8. Motion to amend the Standard Form for Club Bylaws by club opener
   (Article I, Section 1.1 – Club name)
   
   Motion made by _____________________________, seconded by
   _____________________________, that this organization shall be
   known
   as the Kiwanis Club of _____________________________.
   
   Motion carried.

9. Motions to amend the mandatory policies of the club by club opener
   A. CLUBS DUES AND FEES
   
   Motion made by _____________________________, seconded by
   _____________________________, that members will pay the
   following financial obligations to the club:
   1. Currency: _____________________________
   2. Annual dues amount: _____________________________
   3. New member enrollment fee amount: _____________________________
   
   Motion carried.

   Download this document at www.kiwanis.org/clubopener.
B. MEMBERS IN GOOD STANDING

Motion made by ____________________________, seconded by ____________________________, that a member is not considered in good standing with the club if he/she is more than _________ months -or- ___________ (amount) in arrears on dues or fees owed by that member.

Motion carried.

C. OFFICERS AND DIRECTORS

1. Motion made by ____________________________, seconded by ____________________________, that this club has [state number] ____________ offices of vice-president.

Motion carried.

2. Motion made by ____________________________, seconded by ____________________________, that this club has ________ directors.

   Note: A minimum of three directors are required. There is no maximum number.

   Motion carried.

3. Motion made by ____________________________, seconded by ____________________________, that a vacancy in the office of president shall be filled by ____________________________.

   Motion carried.

D. OFFICERS AND DIRECTORS TERMS

Motion made by ____________________________, seconded by ____________________________, that officers and directors terms are as follows:

1. President, president-elect, immediate past president: _____ (1 year or 2 years.)
2. Secretary: _____ (1 year or 2 years.)
3. Treasurer: _____ (1 year or 2 years.)
4. Vice-president(s) (if any): _______ (1 year or 2 years.)

5. All directors: _______ (1 year, 2 years, or 3 years.)

Motion carried.

E. OFFICERS AND DIRECTORS ELECTION PROCESS

Motion made by ___________________________, seconded by ___________________________, that the election process for this club is as follows:

1. The club secretary will be ___________________________ (elected or appointed).

2. Volunteers will be appointed to prepare the ballot, count the votes, and certify the results.

3. Nominations may be made in advance or from the floor during the annual meeting, with the consent of those nominated.

4. Cumulative voting is not allowed. Absentee ballots are ___________ (allowed or not allowed).

5. Proxy ballots are ___________ (allowed or not allowed).

6. Ballots are only necessary when there are more nominees for an office than offices to be filled. If any ballot does not reflect a majority vote for one nominee, the nominee receiving the fewest votes will be dropped and a new vote taken for the remaining nominees; the same process will be followed until one nominee receives a majority of the votes. If there are more nominees for directors than offices to be filled, those receiving the highest number of votes will be declared elected without additional voting.

7. Electronic balloting is permitted for club elections. Secure website balloting is recommended to ensure privacy and accuracy. Use the KiwanisOne Club Management System or consult Kiwanis International for guidelines.

8. The club secretary will certify the election results to Kiwanis International (and to the district and federation, if any).

9. Incoming officers and directors are referred to as “-designate” (examples: president-elect-designate, secretary-designate, etc).

Motion carried.
F. ANNUAL FINANCIAL REVIEW

Motion made by ____________________, seconded by ____________________.

To perform its annual financial examination as stated in Bylaws Section 8.3, this club shall:

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

Motion carried.

10. Adoption of club by bylaws and mandatory policies by club opener

Motion made by ____________________, seconded by ____________________

that the club bylaws and mandatory policies, as submitted and as amended by the preceding motions, be adopted as the bylaws of this club.

Motion carried.

11. Nomination and election of officers and directors by club opener

Report of nominating committee chairman

Additional nominations from the floor

Election of officers and directors

PRESIDENT ____________________ DIRECTOR ____________________

PRESIDENT-ELECT ____________________ DIRECTOR ____________________

VICE PRESIDENT* ____________________ DIRECTOR ____________________

VICE PRESIDENT* ____________________ DIRECTOR ____________________

VICE PRESIDENT* ____________________ DIRECTOR ____________________

VICE PRESIDENT* ____________________ DIRECTOR ____________________

TREASURER ____________________ DIRECTOR ____________________

SECRETARY** ____________________ DIRECTOR ____________________

* As determined in mandatory policy C above

** Elected or appointed as determined in mandatory policy E above
12. Induction of officers and directors by lieutenant governor
13. Acceptance address by the newly elected president
14. Announcement of the first board of directors meeting immediately following the adjournment of the organizational meeting
15. Adjournment of the meeting
Sample agenda for the first meeting of the board of directors of a new Kiwanis club

1. Official depository for club funds.
   Motion made by ______________________, seconded by ______________________, that the official depository for the funds of this club shall be ______________________.
   Motion carried.

2. Approval of signatures for withdrawal of funds.
   If two signatures shall be desired for the withdrawal of funds from the accounts of this club, three officers should be approved so that two are normally available to transact the financial business of the club.

   Motion made by ______________________, seconded by ______________________, that signatures be required for withdrawal of funds from the accounts of this club. Further, that such signatures shall be ______________________, ______________________, and ______________________.
   Motion carried.

3. Club meetings.
   Motion made by ______________________, seconded by ______________________, that meetings of the club shall be conducted on ________________ (day) at ________________ (a.m.) (p.m.) with such meeting to be conducted at ______________________ (place).
   Motion carried.

Download this document at www.kiwanis.org/clubopener.
4. Monthly meetings of the board of directors.

Motion made by __________________________, seconded by __________________________ that the regular meetings of the board of directors shall be conducted on ___________ (day) at ___________ (a.m.) (p.m.) with such meeting to be conducted at _______________ (place).

Motion carried.

5. Annual meetings.

Motion made by __________________________, seconded by __________________________ that the annual meeting of the club shall be the regular meeting in ________________.

Motion carried.


Kiwanis International recommends each club have standing committees on Membership (covers invitation, retention, education, and public relations); Programs (covers club meetings and special events); and Service and Fundraising (also covers community services, Service Leadership Program, and the Kiwanis International Global Campaign for Children).

Motion made by __________________________, seconded by __________________________ that this club has the following standing committees:

1. Committee name: ____________________________________________
2. Purpose: ____________________________________________________
3. Duties: _____________________________________________________
4. Committee name: ____________________________________________
5. Purpose: ____________________________________________________
6. Duties: ________________________________________________________________

7. Committee name: _____________________________________________________

8. Purpose: ______________________________________________________________

9. Duties: ________________________________________________________________

7. Authorizing payment.
   The fees to accompany the official papers must be authorized by the board in the same manner as all payments from the funds of this club.

   Motion made by ______________________, seconded by ______________________,
   that the treasurer is hereby directed to draw a check in the amount of US$ ______ payable to Kiwanis International.

   Motion carried.

8. Charter ceremony.
   Motion made by ______________________, seconded by ______________________,
   that the TENTATIVE DATE for the charter presentation ceremony shall be
   _______________ (day) at _______ (time) at
   ___________________________________________ (place). Motion carried.

   ____________________________          ____________________________
   (Club president)                (Club secretary)

Note: As stated in the club bylaws (Sec. 10.5): “The club board may adopt other club policies that are not in contravention of the applicable laws, club bylaws, Kiwanis International bylaws, and district and federation bylaws (if any) by at least a majority vote of the club board members present and voting, provided at least fourteen (14) days previous notice is given to the board members.”

Review the Optional Club Policies to determine if other policies need to be established for club operations at the first meeting of the club board of directors.
Polishing up the paperwork

Get your new club on the books by sending the required paperwork to Kiwanis International via the club-opening tool.

Submit within 24 hours of organizational meeting:
- New-club information sheet

Submit within 30 days of organizational meeting:
- Permanent organization roster
- Standard Form for Club Bylaws
- Charter member fees

After the club completes the necessary paperwork and submits its fees, Kiwanis International will:
- Assign the club a key number.
- Issue a charter certificate.
- Provide certificates and pins to give members at the charter ceremony.

It’ll take 4–6 weeks for these items to arrive.

Kiwanis Kash

Did you know that new clubs can choose either a traditional charter gift (including the gong, gavel, personalized club banner and a Kiwanis flag) or a merchandise certificate from the Kiwanis Store to purchase the items that best fit its needs? Download the Kiwanis Kash form from the club-opening tool and submit it with your official paperwork.

You did it!

After the club is organized and the paperwork is submitted to Kiwanis International, your job is complete! The club counselor will now take the lead, educating and training the members, advising the club through the incorporation process (if applicable) and supporting club members’ efforts to reach key milestones during the first year.
Wrapping it up

Finding more help

We have the information and resources you’ll need throughout your years of service. Some are materials and some are events—and almost all of them are just a few clicks away.

WEBSITE

• The Formula website: www.kiwanis.org/theformula
• Club-opening online tool: www.kiwanis.org/newclubtool
• Club opener online resources: www.kiwanis.org/clubopener
• The Formula tracking system: www.kiwanis.org/formulatools

TUTORIAL AND VIDEOS

Watch, learn and enhance your knowledge of Kiwanis, your club and your ability to serve with Kiwanis tutorials. Check them out at www.kiwanis.org/tutorials.
Events to remember

Kiwanis district conventions
- Member education opportunities
- Fellowship
- House of delegates
- Awards and recognition
- District elections

Kiwanis International convention
- Member education opportunities
- Fellowship
- House of Delegates
- Awards and recognition
- International elections

Kiwanis International convention schedule

2014: July 16–19   Tokyo-Chiba, Japan
2015: June 25–28   Indianapolis, Indiana
              Come celebrate the 100th anniversary of Kiwanis!
2016: June 22–25   Toronto, Ontario, Canada
2017: July 13–16   Paris, France
Dear participant:

Thank you for being a leader—and for participating in club counselor education. The information you receive during this session will help ensure your success as you begin your new role.

This workbook will be a crucial companion throughout the year. It’s your guide to information and inspiration. Take a little time to become familiar with it. Your experience with club counselor education is an essential first step toward a successful experience as a Kiwanis division leader. Please keep this workbook and refer to it throughout your tenure as a club counselor.

This book is designed to assist you in supporting new clubs and revitalizing existing clubs. Please refer to the table of contents to see which sections apply to the type of club you’re counseling. The first portion of the workbook discusses coaching new clubs, while the second portion focuses on counseling clubs that are at least one year old.
Getting started

The objective of this education session is simple: to prepare you to provide mentoring and guidance to new Kiwanis clubs as well as existing clubs that need support to reinvigorate themselves.

We’ll accomplish this by addressing these questions:

- What is your job?
- How can you help new clubs?
- How can you help existing clubs?
- What resources are available?

How will we know if we’ve accomplished the goal?

- New clubs will reach a membership strength of at least 25 members in their first year—and remain vibrant after their first two years.
- Existing clubs that undergo successful counseling will reach charter strength and have net increases in their membership at the end of each year.

Perhaps more importantly, the club you work with will be healthy, relevant and positioned to make a difference in the community. And you’ll be at the forefront of making Kiwanis’ multi-year initiative a success—by inspiring a renewed Kiwanis culture.
When you love something—when something really matters to you—you want to share it. You want other people to love it with you. You want it to be part of your life.

The Formula:

❤️ Take something you love
💬 Share it with others
🤖 Make it a part of your life

Love it. Share it. Live it.
Your job

Club counselor position description

Preferred experience:
- Starting successful club-level membership efforts
- Using email, as well as calendar, spreadsheet, word-processing, presentation, and project-management software effectively
- Maintaining positive working relationships
- Enhancing others’ skills and productivity
- Managing conflict

Preferred attributes and skills:
- Committed to strengthening new and existing Kiwanis clubs as a certified club counselor
- Member of a club that has maintained or increased its membership
- Past club president or secretary
- Past or current club membership chair
- Accomplished recruiter and motivator
- Communicates effectively
- Effective team-building skills
- Supports and encourages other team members
- Solves problems
- Exhibits sound judgment
- Positive and enthusiastic
- Diplomatic
- Focuses on innovation
- Firm, decisive and practical

A toolkit just for you:
www.kiwanis.org/clubcounselor
Your responsibilities:

• New clubs:
  • After assistance is requested, ensure that new clubs become independent and strong, with a minimum of 25 members
  • Work closely with the division lieutenant governor and club opener to support the club-opening process and develop a timetable to assist new clubs in getting started
  • Start mentoring new clubs after the organizational meeting (but ideally become involved before the pre-organizational meetings)

• Existing clubs:
  • Mentor the leaders of a struggling Kiwanis club, or a club with low membership that has submitted a request for assistance to the lieutenant governor
  • Provide objective advice, assisting the club in implementing a plan to increase membership
  • Use the Achieving Club Excellence tools to guide clubs
  • Provide regular reports to the district chair and the lieutenant governor
  • Participate in membership planning meetings with the lieutenant governor at training or at conventions

Commitments:

• Serve as a club counselor for a minimum of three years
• Attend district or division events
• Able and willing to travel
• Support each mentee club for at least one year

This is a voluntary position. We appreciate your dedication to Kiwanis and your community. Thank you for all you do!

HOW DOES THE FORMULA APPLY TO YOU?

The Formula aims to achieve three specific goals:

• Develop a leadership structure with _______ additional leaders
• Expand Kiwanis’ impact to ______ new communities
• Inspire and equip clubs to be stronger by an average of ______ members
Our team

Here’s where you fit into the team.

**THE FORMULA COMMITTEE**
- The Formula committee
  - Kiwanis International president and The Formula chairman
  - President-elect
  - Vice president
  - Supporting legacy leaders (2 past presidents)
  - Americas, Asia, Europe, Africa chairs (4)
- Region chairs (11)

**DISTRICT**
- District governors (50)
- District chairs (50)

**DIVISION**
- Lieutenant governors (875)
- Certified club counselors (1,750)
- Certified club openers (875)

**CLUB**
- Club presidents (7,000)
- Club membership committee chairs (7,000)

- Traditional Kiwanis roles
- The Formula roles

**Your job**
Effective club counselor skills

When helping clubs, think of yourself more as a coach than a teacher. As a club counselor, your goal isn’t to tell the club what to do, but to empower its leaders and members to determine what they need to do to make their club the place to be.

The following four techniques will help you earn trust, discover information and stimulate self-awareness and personal responsibility in club leaders and members.

• **Active listening.** People may understand more about how they feel about a topic after talking about it. A coach helps people talk through a topic by listening effectively.

• **Clarifying questions.** Asking questions helps people clarify their thoughts, increases understanding and elicits additional detail. These questions should help people probe their thoughts, summarize decisions and find solutions.

• **Open-ended questions.** Open-ended questions tend to provide more information and probe deeper thinking than those that can be answered with a “yes” or “no” response or just a few words.

• **Possibility positioning.** To bring out the best in a club’s leaders, ask questions that allow them to brainstorm possibilities for achieving their own objective.
What’s optional and what’s not

Although Kiwanis is a flexible organization, there are a few requirements that members and clubs are to follow.

Many clubs have adopted traditions such as singing songs, ringing the gong at the beginning and end of every meeting or having their club banner on display. Every club adopts its own traditions. On the other hand, there are some standard Kiwanis practices that are required.

REQUIRED BY CLUB BYLAWS

Adopting our standard bylaws helps make a Kiwanis club unique from any other service organization that might exist in the community.

• Clubs must hold a minimum of one meeting per month.
• The club board will meet regularly at a designated place and time that it determines.
• One meeting each year between January 1 and May 15 will be designated as the annual club meeting for club elections.
• Clubs must conduct an annual financial review.
• Elected club officers must include a president, immediate past president, president-elect, secretary, treasurer (unless the positions of secretary and treasurer are combined) and a minimum of three directors.*
• Monies received for club service activities, regardless of the source, may be used only for service activities. Separate accounting records must be maintained for service and administrative funds.
• By October 15 of each year, the board must adopt separate budgets of estimated income and expenses for the club’s administrative and service funds.
• A club will incorporate or register as required by law with the proper government authority (or authorities) within one year after its charter date and maintain such incorporation registration.
• The club board will provide prompt payment of all dues, fees and other obligations to Kiwanis International, the district and federation (if applicable).

*The positions of secretary and treasurer can be combined. The position of vice president, or multiple vice presidents, is optional for each club. The secretary may be appointed by the board; however, if secretary is combined with treasurer, the position must be elected.
OPTIONAL KIWANIS TRADITIONS

Kiwanis clubs have developed many traditions over the years. Some have become so common and routine that members simply expect them. However, each club chooses its own traditions.

What traditions have you experienced?

• _______________________________________________________________________
• _______________________________________________________________________
• _______________________________________________________________________
• _______________________________________________________________________
• _______________________________________________________________________
• _______________________________________________________________________
• _______________________________________________________________________
• _______________________________________________________________________

Tip: The Standard Form for Club Bylaws template is included in the Resources section on page 104.
Working with new clubs

When you mentor a new club, your job begins during the final phase of the club-opening process: its organization.

Education

As a certified club counselor, you’ll be responsible for providing educational opportunities to members.

NEW-MEMBER ORIENTATION

Since most members will be new to Kiwanis, all members—not just officers and board members—need to understand the Kiwanis organization.

New-member orientation includes:

• An overview of the defining statement and the Six Objects of Kiwanis
• Member expectations
• Benefits of Kiwanis-club membership
• My Kiwanis club
  • Service project and fundraising plans
  • The club’s role in the division and district
  • Club committees and how to become involved
• Kiwanis beyond your club
  • The structure of Kiwanis at the club, division, district and international levels
  • Service Leadership Programs
  • Kiwanis branded programs
  • Kiwanis International Foundation
  • District and Kiwanis International conventions
• Standard club operations
  • Club bylaws
  • How club business is handled (what members vote on, how elections are handled)
  • The function of the club’s board of directors
  • Finance and budget (Including what dues dollars cover)

Find the new-member orientation program at www.KiwanisOne.org/orientation.
CLUB LEADERSHIP EDUCATION

A successful club needs leaders who grasp why their position matters and what it involves.

You have a variety of ways to help new club leaders understand their roles.

• Work with a master instructor or certified instructor in your division to arrange for one-on-one Club Leadership Education for the club president and club secretary.

• Steer leaders to the online Club Leadership Education courses. Leaders can access these self-paced e-learning courses multiple times during their term.
Club committee structure

Next, focus on a club’s committee structure. Besides the required Financial Review Committee, three additional standing committees are recommended: Membership, Programs, and Service and Fundraising.

Each club has a list of standing committees within their bylaws. But many clubs over the years have added committees for different functions, such as specific fundraisers and service activities.

The standing committees likely include:

**Financial review (required)**

**Membership**
- Invitation
- Retention
- Education
- Public relations

**Programs**
- Club meetings
- Special events

**Service and fundraising**
- Community services
- Service Leadership Programs
- Kiwanis International Global Campaign for Children

These topics can be divided into separate committees depending on the club’s preference.

You’ll find more details about each committee’s role under the Lead tab on www.kiwanis.org/kiwanisone.

**Tip:** E-learning courses are offered for all committee chairmen and for membership committee members too. Complete this education at www.KiwanisOne.org/CLE.
Finances and liability

INCORPORATION

In most areas of the world, nonprofit organizations must incorporate or register themselves with a governmental authority. Clubs generally have one year from the date on their charter certificate to complete the appropriate paperwork. You can contact your district secretary to learn more about the requirements for your area.

INSURANCE

Insurance is something all clubs should consider. Members in the United States and Canada pay an additional US$12 fee for general liability insurance. The general liability insurance covers bodily injury or property damage arising from a Kiwanis-sponsored function or activity. In addition, members in the United States and Canada pay a US$4 fee for a directors and officers insurance program. The D&O liability insurance protects club or district assets and the assets of members against the cost of lawsuits.

Just a few of the potential costs covered include:

• Employment practices liability including accusations of discrimination, sexual harassment and wrongful termination
• Allegations of mismanagement of funds
• Failure to enforce bylaws
• Violation of state/provincial and federal bylaws
BANK ACCOUNTS

One of the very first matters for the Board of Directors of a new Kiwanis club to address is opening two checking accounts to maintain the club’s administrative and service funds. The board needs to approve the designated bank, as well as authorize at least two people to sign for the deposit and withdrawal of funds. Banks in the United States require clubs to furnish an Employer Identification Number—which clubs apply for from the Internal Revenue Service—when opening an account.

TAX FORMS

Clubs in the United States also need to apply for appropriate tax documentation, complete the requirements and then provide the official document(s) to Kiwanis International.

Tip: You can assist clubs with incorporation, insurance, bank accounts, and tax forms by using the resources at www.kiwanis.org/clubcounselor.
Becoming part of the community

CHARTER CEREMONY CELEBRATION

Charter ceremonies introduce the club both to the community and to the larger Kiwanis family.

- **Public relations toolkit for club strengthening**: Educating the community about Kiwanis and the niche the club is anticipated to fill will help it gain support and visibility that will be important for establishing local roots.

- **Sample agenda**: Get a guideline for determining the program's speakers and how to recognize new members. At minimum, provide a printed program with the names of all charter members. See page 120 of the Resources section for more information.

- **Planning a charter night silent auction**: Find tips and templates for advertising and hosting a silent auction. See page 116 of the Resources section for more information.

Tip: Find the Public relations toolkit for club strengthening at www.kiwanis.org/clubcounselor.
ON THE BIG NIGHT

Ideally every club in the division would be represented at the charter ceremony. An invitation would most likely come from the lieutenant governor. It is a common practice for clubs in the division to welcome the new club by presenting a monetary gift. This is also an appropriate time to recognize the club-opening team—with a special mention of any members who earned a Ruby K, which is awarded for bringing at least five members to Kiwanis. This is also an appropriate time to recognize the club-opening team—with a special mention of any members who have earned special membership awards as a result of their involvement.

If possible, the district governor presents the charter-member certificates and pins to the club members. And here’s a useful idea for gaining community support: Invite the mayor/town council president and the superintendent of schools as guests if they aren’t already charter members.

FIRST FUNDRAISER

New Kiwanis clubs need sufficient funds to begin serving the community and conducting activities. Hosting a silent auction at the charter ceremony can help right away.

Tip: One resource for effective fundraising ideas is The Eliminate Project website: www.TheEliminateProject.org.

Club leaders will need to keep fundraising as an important emphasis.
FIRST SERVICE PROJECT

Club meetings are essential for planning and decision-making, but the driving force behind the Kiwanis experience is service in the community. Immediately involving members in a service project reinforces the importance of service to Kiwanis club membership.

Youth programs:

- Read Around the World
- Terrific Kids
- Bring Up Grades

Service Leadership Program clubs:

- K-Kids
- Builders Club
- Key Club
- Circle K International
- Aktion Club

For some clubs (and some communities), it may be better to start with simple service projects or activities.

Tip: Chartering toolkits for Service Leadership Programs are available at www.KiwanisOne.org/charter.
ONGOING INVITING

The publicity and energy surrounding the charter night can inspire people to get involved—so capitalize on it. Encourage the use of a guest book at the charter night event and ask club members to follow up and invite guests to another event or a club meeting.

As the new club establishes its purpose and organizes its leadership structure, some charter members may decide it’s not what they expected. Others may move away or lose interest. These situations are not unusual—and that’s why inviting more people to join the club needs to be a normal, continuing activity.

**Tip:** Find all the ACE tools at www.kiwanis.org/formulaforstrength.

FIRST MEMBERSHIP DRIVE

Of course, a Kiwanis club doesn’t need to rely solely on one-on-one interactions to increase its membership. The Achieving Club Excellence tool Hosting a membership drive, available in the Resources section on page 158, will help guide the club through a membership drive.
CREATING A PURPOSE

After about six months, members will have a better idea of the club’s role and service niche in the community. The ACE tool Creating a purpose, available in the Resources section on page 137 and also online, can help.

PLANNING FOR THE FIRST YEAR

Help club leaders become more familiar with the Kiwanis administrative year, which begins October 1. The Kiwanis year overview, which you’ll find in your Resources section on page 164, is a good place to begin. This resource offers a detailed checklist for club leaders with due dates and important events, broken down by month.

Let’s take a look at the organization and mentoring process timeline.
**SAMPLE SHEET**

The first six months

<table>
<thead>
<tr>
<th>Activity</th>
<th>Date</th>
<th>Committee responsible</th>
<th>Action steps, comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Charter ceremony celebration*</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>First service project</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>First fundraiser</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>First membership drive</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Club incorporation (if applicable)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bank account</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*suggested at least 4-6 weeks after organization paperwork has been received at the Kiwanis International Office*
Working with new clubs

<table>
<thead>
<tr>
<th>Activity</th>
<th>Date</th>
<th>Committee responsible</th>
<th>Action steps, comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Member satisfaction*</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Service projects</td>
<td></td>
<td></td>
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<tr>
<td>Fundraisers</td>
<td></td>
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<tr>
<td>Membership drive**</td>
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</tbody>
</table>

*Use the Measuring member satisfaction ACE tool to conduct a brief member survey.

**Use the ACE tool Hosting a membership drive to help plan your event.
Working with existing clubs

Step 1: Assessing the situation

Clubs counselors play an important role with existing clubs too. Whereas new clubs are still establishing their identities, existing clubs have histories and traditions.

But even clubs that want to improve might feel overwhelmed by the thought of altering traditions and trying new things. Where and how to start? This is where you can make a big difference.

WHERE IT STARTS

You might find out in one of these ways that a club needs help:

- A lieutenant governor has identified a club in need of guidance.
- A club has asked for support on its own accord.

Your first step is to understand the club’s circumstances.
EARNING TRUST, GAINING INSIGHT

An effective club counselor earns the trust of club leaders while also gauging their commitment to improvement. Some clubs will be receptive and welcome your help. Some clubs will recognize their struggles but hesitate to change. And some clubs will simply be unwilling to change. You can’t help a club that won’t take your help—so focus your attention on the clubs that want to make changes and are ready to improve.

Two ACE tools may help your discussions.

Creating the purpose: Let members express what’s working and what inspires them.

Club scorecard: Track key indicators of the club’s performance—and get insights into leaders’ commitment.
<table>
<thead>
<tr>
<th>Possible scenario</th>
<th>Recommended action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Club members seem to recognize the need for change but are resistant or hesitant to make it.</td>
<td></td>
</tr>
<tr>
<td>Another Kiwanis leader alerts you to the need for change but the club seems resistant or hesitant.</td>
<td></td>
</tr>
<tr>
<td>Another Kiwanis leader alerted you to the need for change, and the club seems open-minded.</td>
<td></td>
</tr>
<tr>
<td>Club members seem open to change but not willing to put forth the effort.</td>
<td></td>
</tr>
<tr>
<td>Club members don’t seem willing to do anything.</td>
<td></td>
</tr>
<tr>
<td>The club is determined to close.</td>
<td></td>
</tr>
<tr>
<td>Club members seem to recognize the need for change and are willing to take steps toward improvement.</td>
<td></td>
</tr>
</tbody>
</table>
INTERIM MEMBERSHIP STATUS

Did you know? Members who leave their Kiwanis clubs can obtain interim membership status until they find another club. According to the Kiwanis International Bylaws (Article VIII, Section 5):

a. Interim status may be granted to members in transition who have left membership in one (1) club without any outstanding obligations and anticipate joining a new club. (6/2000)

b. Any member in good standing who resigns from a club may apply to Kiwanis International for interim status, for a period not to exceed one (1) year. (6/2012)

c. The fee for interim status shall be the amount of annual International dues (and fees, if applicable), payable upon application. (6/2000)

d. During interim status, the individual shall not have the privilege of representing a club at any club, district, or International functions. (6/2000)

e. At the time such individual joins another club or if such individual does not join a club within the one-year period, interim status shall be terminated. (6/2000)

Contact Kiwanis International for more information.
Step 2: Diagnosing the need

If a club has made a commitment to change, you’re ready to begin identifying what changes need to be made. Focus on the resources and processes that offer the best path to becoming a better club.

GUIDING THE CLUB TO EXCELLENCE

Based on the conversations you’ve had with the Kiwanis club, you can now select from a number of tools that help guide a club toward excellence.

Here is a quick summary of each tool and when it’s most likely to help. For the greatest benefit, use the tools in this suggested order.

<table>
<thead>
<tr>
<th>Tool</th>
<th>When and why to use it</th>
</tr>
</thead>
</table>
| Club scorecard                   | • **When to use it**: At any point in the process—in the beginning to help the club leaders (and you) understand the situation, or later on to track progress  
• **Why to use it**: To start conversations with club leaders on where they think they can improve and how                                            |
| Creating the purpose             | • **When to use it**: When the club is unsure about its purpose in the community  
• **Why to use it**: To start conversations with club members about what inspires them to continue serving the community as a Kiwanian  
To help a club define its purpose in the community for members, donors, partners and potential members |
| Measuring member satisfaction    | • **When to use it**: Annually, or when there’s been a great change in club membership  
• **Why to use it**: To assess the club experience in four areas: club management/administration, membership strength, community service impact, and member experience  
To guide club leaders in using member feedback to improve the club |
<table>
<thead>
<tr>
<th>Tool</th>
<th>When and why to use it</th>
</tr>
</thead>
</table>
| Developing community partnerships | - **When to use it:** When a club is looking to expand its service impact or improve its revenue sources  
  - **Why to use it:** To examine possible ways of increasing the club's partnerships and sponsorships                                                                                                               |
| Rediscovering your community  | - **When to use it:** When a club needs to find new service opportunities or is unsure of its purpose in the community  
  - **Why to use it:** To gather information about community needs and how the club can help address them  
  To assess a club's current service activities  
  To reveal potential opportunities for new partnerships, sponsorships and service projects                                                                                             |
| Analyzing your impact         | - **When to use it:** To improve the impact your club makes in the community  
  - **Why to use it:** To assess the success of a club's service and fundraising activities and determine opportunities for improvement                                                                                             |
| Planning for club excellence  | - **When to use it:** In conjunction with the club scorecard  
  - **Why to use it:** To guide a club through the planning process that helps it fulfill its purpose in the community—with action steps, responsibilities and timelines  
  To guide a club to set SMART goals, measure success and celebrate milestones                                                                                                                                 |

Working with existing clubs
<table>
<thead>
<tr>
<th>Tool</th>
<th>When and why to use it</th>
</tr>
</thead>
</table>
| Hosting a membership drive  | • **When to use it:** To increase your club’s capacity to serve its community  
                               • **Why to use it:** For step-by-step guidance and strategies to increase membership  
                               For ideas about who to invite  
                               To create a culture of ongoing inviting |
| Celebrating success         | • **When to use it:** To get ideas about when and how to recognize members’ contributions and behaviors  
                               • **Why to use it:** For ideas to foster member and club pride  
                               For new ideas about showing appreciation  
                               To encourage future interaction between community organizations and members  
                               To reinforce relationships with community partners |
GETTING BACK TO BASICS: EDUCATION

If earlier conversations indicate that the club could benefit from more effective leadership, encourage leaders to visit (or revisit) Club Leadership Education or the Leadership Guide to give club officers, board members and committees foundational knowledge.

FOCUS ON MEMBER EXPERIENCE

Measuring member satisfaction

Analyzing your impact

Rediscovering your community

Planning for club excellence

Tip: Reacquainting the entire club with the basics is a good way to bring everyone up to speed.
BEING RELEVANT IN THE COMMUNITY

The needs of a community change. So Kiwanis clubs need to change and evolve. Not only does the Kiwanis club need to remain relevant, but the community also needs to know how Kiwanis is creating positive change.

Rediscovering your community

Developing community partnerships

Public relations toolkit for club strengthening
THE END GOAL: STRONG MEMBERSHIP FOR COMMUNITY RELEVANCE

The best way to be an effective club counselor is to keep your end goal in mind: a strong and vibrant membership that makes the club experience rewarding for current Kiwanians and inviting to others.

Make sure the club president has appointed a membership committee.

___________________________________________________________________________
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Make sure all standing committees are populated and functioning well.

___________________________________________________________________________
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Coach the club to establish membership goals.
What are some possible annual goals a club may consider?

• Reaching charter strength of 15 members
• Reaching (and maintaining) a 25-member club roster
• Increasing membership by one
• Increasing membership by five
• Increasing membership by ten
• Increasing membership by 20
• Reaching a goal connected to Kiwanis’ 100th anniversary (e.g., a 100-member roster)

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Tip: Clubs may consider hosting an open house themed around The Eliminate Project. To learn more, visit the Resources section on www.TheEliminateProject.org.
CELEBRATING SUCCESS

Kiwanis clubs that improve their communities have much to be proud of. Encourage clubs to celebrate accomplishments large and small—and to recognize the members who make them happen.
Step 3: Providing continued support and mentoring

As an effective club counselor, your influence should continue to be felt in:

- Ongoing membership efforts
- Consistent participation in division, district and Kiwanis International activities
- Tracking of progress toward ongoing goals
- Selection and transition of new officers and board members
- Preparation of incoming officers and board members for the new administrative year
- An expectation that club presidents and secretaries—whether repeat or new—attend Club Leadership Education
- **Planning for club excellence** with the new board of directors
- Re-evaluation of member satisfaction with the **Measuring member satisfaction** tool
- Regular community surveys with the **Rediscovering your community** tool
- Developing an annual plan and evaluating the results
Putting it all together

We’ve discussed working with new clubs. And we’ve discussed working with existing clubs. The basic techniques to earn trust, discover information and stimulate self-awareness and personal responsibility are the same. So let’s practice.

SCENARIO 1

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How did the club counselor demonstrate active listening?

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What clarifying questions were asked?

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Did the individual ask open-ended questions? If so, what did they ask?

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How did the club counselor help the club leaders identify possible solutions?

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SCENARIO 2
Putting it all together
Wrapping it up

Finding more help

There are many places to find information and resources to help you succeed. Some are materials, some are events—but almost all are just a few clicks away.

WEBSITE

• Tools and links just for you: www.kiwanis.org/clubcounselor
• The Formula website: www.kiwanis.org/theformula
• The Formula tracker: www.kiwanis.org/formulatools
• Club-opening online tool: www.kiwanis.org/newclubtool
• Opening clubs: www.kiwanis.org/newcommunities
• Strengthening clubs: www.kiwanis.org/formulaforstrength

TUTORIAL AND VIDEOS

Watch, learn and enhance your knowledge of Kiwanis, your club and your ability to serve with Kiwanis tutorials. Check them out at www.kiwanis.org/tutorials.
Events to remember

**Kiwanis district conventions**
- Member education opportunities
- Fellowship
- House of delegates
- Awards and recognition
- District elections

**Kiwanis International convention**
- Member education opportunities
- Fellowship
- House of Delegates
- Awards and recognition
- International elections

**Kiwanis International convention schedule**

<table>
<thead>
<tr>
<th>Year</th>
<th>Dates</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>July 16–19</td>
<td>Tokyo-Chiba, Japan</td>
</tr>
<tr>
<td>2015</td>
<td>June 25–28</td>
<td>Indianapolis, Indiana</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Come celebrate the 100th anniversary of Kiwanis!</td>
</tr>
<tr>
<td>2016</td>
<td>June 22–25</td>
<td>Toronto, Ontario, Canada</td>
</tr>
<tr>
<td>2017</td>
<td>July 13–16</td>
<td>Paris, France</td>
</tr>
</tbody>
</table>
Resources

Service Leadership Programs overview
Sponsoring a new Kiwanis club
Community exploration form
Club-opening team checklist

Required paperwork and fees:
• New-club fees worksheet
• Permanent organization roster
• New-club information sheet
• Standard Form for Club Bylaws

Planning a charter night silent auction
Planning a charter ceremony celebration
Public relations toolkit for club strengthening

Achieving Club Excellence tools:
• Club scorecard
• Creating the purpose
• Measuring member satisfaction
• Developing community partnerships
• Rediscovering your community
• Analyzing your impact
• Planning for club excellence
• Hosting a membership drive
• Celebrating success

Kiwanis year overview

These resources are here for your reference. Download them from the club-opening tool or from your toolkit page, either www.kiwanis.org/clubopener or www.kiwanis.org/clubcounselor.
Kiwanis has been sponsoring youth programs since the first Key Club was chartered in 1925. Since then, other programs have been added—including Aktion Club for adults with disabilities—and each has enjoyed tremendous increases in membership. Around the world, these Service Leadership Programs (or SLPs) have become core projects of sponsoring Kiwanis clubs. Each SLP belongs to one of two categories: service clubs or programs/initiatives.

**SERVICE CLUBS**

**AKTION CLUB**

*Founded:* 2000  
*Mission:* Aktion Club provides adults living with disabilities with an opportunity to develop initiative, to learn leadership skills and to serve their communities.  
*Members:* Adults (18 and older) who have a disability  
*Statistics:* 12,000 members, 490 clubs, 8 nations  
*Website:* www.aktionclub.org  
*Notes:* Since this is a club for adults with disabilities, be careful not to identify all SLPs collectively as “youth programs.” Aktion Club has seen tremendous expansion over the last 10 years.

**CIRCLE K INTERNATIONAL (CKI)**

*Founded:* 1947  
*Mission:* CKI is an international student-led organization seeking to develop college and university students into a global network of responsible citizens and leaders with a lifelong commitment to service.  
*Members:* Students enrolled at an institution of higher education  
*Statistics:* 13,500 members, 450 clubs, 19 nations  
*Website:* www.circlek.org  
*Note:* CKI is governed by a student board comprised of current members.
KEY CLUB

Founded: 1925

Mission: Key Club is an international student-led organization providing its members with opportunities to perform service, build character and develop leadership.

Members: High school students age 14–18

Statistics: 267,000 members, 5,000 clubs, 31 nations

Website: www.keyclub.org

Notes: Key Club has seen a progressive increase in membership for many years. Like CKI, Key Club is governed by a student board of current members.

BUILDERS CLUB

Founded: 2000

Mission: Builders Club is an international student-led organization providing members with opportunities to perform service, build character and develop leadership.

Members: Middle school students age 11–14

Statistics: 46,000 members (estimated), 1,500 clubs, 18 nations

Website: www.buildersclub.org

Notes: Builders Club has also seen tremendous increases in its membership in the last few years. Currently, Kiwanis tracks the number of clubs worldwide, with corresponding estimates of membership numbers.

K-KIDS

Founded: 2000

Mission: K-Kids is an international student-led organization providing members with opportunities to perform service, build character and develop leadership.

Members: Elementary school students age 6–12

Statistics: 37,000 members (estimated), 1,200 clubs, 8 nations

Website: www.kiwaniskids.org

Notes: As with Builders Club, Kiwanis tracks the number of clubs worldwide, with corresponding estimates of membership numbers.
PROGRAMS/INITIATIVES

KEY LEADER
Key Leader is a weekend experiential leadership program for students age 14–18. The curriculum focuses on “service leadership” and has modules on five major principles: integrity, personal growth, respect, community and pursuit of excellence. The weekend experience includes full group sessions led by a trained lead facilitator and small discussion groups called “neighborhoods.” A challenge course of team-building activities is also a featured component. Since 2005, there have been more than 21,000 graduates around the world. A team of Kiwanis volunteers from the district coordinates marketing and on-site logistics and generates financial support for students to attend. That team is led by a district chairman and site coordinator (for each event) appointed by the district governor.

Website: www.key-leader.org

TERRIFIC KIDS
Terrific Kids is a student-recognition program that promotes character development, self-esteem and perseverance. “Terrific” is an acronym for Thoughtful, Enthusiastic, Respectful, Responsible, Inclusive, Friendly, Inquisitive and Capable. Students work with the classroom teacher to establish goals to improve behavior, peer relationships, attendance or school work. All students who achieve their goals after a specified time are recognized as Terrific Kids. Recognition includes receiving a pin as a Terrific Kid; a pizza, ice cream or other food-themed party; and presentation of certificates and other giveaways. Kiwanis clubs provide financial sponsorship for the program and help to plan and develop the recognition ceremony.

Website: www.kiwaniskids.org

BRING UP GRADES (BUG)
Bring Up Grades (or BUG) is designed to provide recognition to students who raise their grades into an acceptable range and then maintain or continue to raise them from one grading period to the next. Recognition includes placement on the school’s BUG Honor Roll; a pizza, ice cream or other food-themed party; and presentation of certificates and buttons. Kiwanis clubs provide financial sponsorship for the program and help to plan and develop the recognition ceremony.

Website: www.kiwaniskids.org
Sponsoring a new Kiwanis club

Kiwanis clubs can help extend Kiwanis’ reach by sponsoring new clubs in their area. New Kiwanis clubs are organized based on community needs, so if there’s a need in the community, then there’s a need in the community for Kiwanis.

Benefits of being a new-club sponsor

Being a sponsoring club expands the organization and increases an existing club’s visibility in the community, along with increased service performed in the area. Assisting with inviting prospective members for a new club will also strengthen the sponsoring club’s membership because team members learn new techniques and gain confidence through positive results. Sponsoring a new club is a win-win situation.

New clubs learn from experienced, trained Kiwanians to:

- Use local media resources to highlight the club’s impact
- Apply successful techniques for inviting others
- Host service projects and fundraisers rooted in the community and its needs
- Create a satisfying membership experience that emphasizes both service and fellowship

Conversely, sponsoring clubs can learn things from the new club as well. Oftentimes, members of the sponsoring club who become involved in inviting prospective members and making the case for a new club learn how to better assess their own community’s needs—and ensure the relevance of Kiwanis in their own community for many more years to come.

Responsibilities of the sponsoring club

The sponsoring club is an active Kiwanis club able to assist in the organization and development of a new club. The sponsoring club, along with the lieutenant governor, support and nurture the new club for at least the first year, ensuring its success.

Sponsoring Kiwanis clubs agree to:

- Assist the club opener and other core team members during the week visits are paid to prospective members (Recommended)
- Conduct inter-clubs for the first and second pre-organizational meetings and the official organizational meeting
- Assist the club counselor and lieutenant governor in supporting the new club
- Assist in planning the new Kiwanis club’s first service project
- Monitor the new club for one year and help it maintain a roster of 15 members, the membership level of a club “in good standing” with Kiwanis International
Community exploration form

Opening a new Kiwanis club extends Kiwanis' impact to another community and impacts the lives of even more children. Start by exploring the proposed community to gain a better understanding of how Kiwanis can meet its needs and who can support the effort.

Information gathering

Gather background information about the potential club site. Check out websites for local government, real estate agencies, and the public school system.

Name of town/city: __________________________________________________________

Recent/recurring community events: ________________________________

______________________________________________________________________________

Existing service organizations

<table>
<thead>
<tr>
<th>Organization</th>
<th>When it meets</th>
<th>Where it meets</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kiwanis</td>
<td></td>
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<tr>
<td>Rotary</td>
<td></td>
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<tr>
<td>Lions</td>
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<tr>
<td>Optimist</td>
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<tr>
<td>Jaycees</td>
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</tr>
</tbody>
</table>

Population demographics

Ethnicity: __________________________________________________________

Languages: __________________________________________________________

Average age of residents: ____________________________________________
Economic situation
Mean or median income: ________________________________________________________
Top professions/employers: ____________________________________________________

Living conditions
Transiency rate: __________________________________________________________________
Rent/mortgage: __________________________________________________________________
Family living conditions: __________________________________________________________________

Education
Average educational levels: __________________________________________________________________
Childcare options: __________________________________________________________________
Local schools: __________________________________________________________________

Opportunities for a new club
Opportunities for establishing Service Leadership Program clubs in the community:
______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________

What service projects could the club undertake immediately following organization? Prioritize them.
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______________________________________________________________________________
______________________________________________________________________________
Club-opening team checklist

Plan ahead. The more you can establish before the day you begin inviting the better. Cover the following points with your team before going out to talk to potential members in a new community.

• **Who will go where?** Make sure the same business isn’t visited twice. Develop a plan based on lists of community leaders or referrals.

• **What are you going to say?** Practice makes perfect, so discuss the following with the team:
  - Background information you have collected about the community, its leaders, its needs and potential service projects to promote.
  - How to start the conversation
  - Ideas for building rapport
  - How to address common concerns and questions
  - How to follow up about the pre-organizational meeting

• **When do you discuss progress?**
  - Meet at noon to debrief over lunch
  - Meet at the end of the day to debrief to develop a master list of applicants
New-club fees worksheet*

Club openers may use this worksheet to calculate the dues and fees involved in becoming a charter member of a new Kiwanis club. This worksheet is for your reference only and should be used in conjunction with the latest financial information made available by the Kiwanis International Office. Tabulate these amounts as a simple estimate to offer to prospective members.

**Charter member fees for the newly organized club**
Identify the specific amount that charter members of new clubs will be asked to pay when the club is organized, based on the district and Kiwanis nation in which the club is located.

<table>
<thead>
<tr>
<th>Charter member fee ($)</th>
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<tbody>
<tr>
<td>Kiwanis International fees</td>
</tr>
<tr>
<td>$50*</td>
</tr>
<tr>
<td>District fees</td>
</tr>
<tr>
<td>Check with your district treasurer for current information.</td>
</tr>
<tr>
<td>Club fees</td>
</tr>
<tr>
<td>This is determined during the club’s organization meeting.</td>
</tr>
<tr>
<td>Total</td>
</tr>
</tbody>
</table>

**Annual membership dues and fees**
(beginning October 1st for the second administrative year)
Once the club is organized, all members pay annual dues and fees. For a newly organized club, these dues and fees kick in on October 1 of the second administrative year.

<table>
<thead>
<tr>
<th>Member amount ($)</th>
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<tbody>
<tr>
<td>Kiwanis International dues and fees</td>
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<tr>
<td>$62* Check with Kiwanis International for current information.</td>
</tr>
<tr>
<td>District dues and fees</td>
</tr>
<tr>
<td>Check with your district treasurer for current information.</td>
</tr>
<tr>
<td>Club dues and fees</td>
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<tr>
<td>Total</td>
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</tbody>
</table>

*Depending on your country’s GDP and location, the international dues and fees may be adjusted. This is defined in the Kiwanis International Bylaws.
Permanent organization roster

Club name: 
Address: 
Province (if applicable): 
Country:  
Permanent organization date: 
District: 
Number reported:

The new club will receive a club roster from Kiwanis International once the club has been processed.

Signed: ___________________________ Signed: ___________________________
Club president or secretary Club opener

Members (please complete as much as possible)

<table>
<thead>
<tr>
<th>Salutation</th>
<th>First name</th>
<th>Last name</th>
<th>Suffix</th>
<th>Nickname</th>
<th>Gender</th>
<th>*Primary address</th>
<th>Primary city</th>
<th>Primary province (if applicable)</th>
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<tbody>
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<td>Mrs.</td>
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<td>Bc.</td>
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<td>Male or Female</td>
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*All Kiwanis International correspondence will be sent to the primary address.
Tip: Download this document from www.kiwanis.org/clubopener to see the full spreadsheet and to complete it electronically.

<table>
<thead>
<tr>
<th>#</th>
<th>Primary postal code</th>
<th>Primary country</th>
<th>Primary phone</th>
<th>Date of birth (dd/mm/yyyy)</th>
<th>Spouse's name</th>
<th>Primary email</th>
<th>Sponsor's name</th>
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Kiwanis Club of: ___________________________ Key number: __________
(state/province/country)

CLUB TYPE: SELECT ONE (descriptions of club types are on page 2)
☐ Traditional Club  ☐ Golden K Club  ☐ 3-2-1 Club  ☐ Internet Club  ☐ Young Professional Club  ☐ Family Club

District: ____________________________ Location: ____________________________
Division: ____________________________ Number of members joining: ____________
Language: ____________________________

President’s name and mailing address
__________________________________________
__________________________________________
__________________________________________
__________________________________________
Primary phone #: __________________________
Cell: ____________________________
Fax: ____________________________
Email: ____________________________

Day and time of meeting: ____________________________
Place of meeting: ____________________________
Lieutenant governor: (name, mailing address, email address) ____________________________
__________________________________________
Club opener: (name, mailing address, email address) ____________________________
__________________________________________
Club counselor: (name, mailing address, email address) ____________________________
__________________________________________
Sponsor(s): Kiwanis Club(s) of ____________________________

Secretary’s name and mailing address
__________________________________________
__________________________________________
__________________________________________
__________________________________________
Primary phone #: __________________________
Cell: ____________________________
Fax: ____________________________
Email: ____________________________

RETURN TO: Rene Booker, Club processing representative at rbooker@kiwanis.org (08/20/10)
Every day, people contact Kiwanis International interested in discovering more about Kiwanis membership. Please help us to direct these prospective members to the right club experience by choosing the appropriate description of your club below:

**Traditional Club**
Most Kiwanis clubs are considered traditional. They meet socially 2-4 times each month, usually over a meal, perform service to their community in locally relevant ways, and appeal to members for a wide range of reasons.

**Golden K Club**
Golden K clubs have a maturing membership and typically meet in-between meal times.

**3-2-1 Club**
A 3-2-1 club represents three hours of service, two hours of social activity, and a one hour meeting each month. These clubs are part of a pilot project inspired by feedback from current and past members reflecting a desire to meet less and do more.

**Internet Club**
Members meet virtually using online platforms and vary in their inclusion of traditional components of a Kiwanis club meeting, or opportunities to meet up in person for service projects.

**Young Professional Club**
A Young Professional club reflects the lifestyle and behavioral trends of younger people earlier in their careers. Approach to service, social activities, and meetings are fun, impactful, and less formal.

**Family Club**
Family clubs focus meetings and service opportunities around family participation. Every family club is unique in their approach. Members often include extended family and friends, and meetings usually involve kids and service.

**NOTE:** All club memberships are based on an individual paid membership that includes Kiwanis International, district and club dues.
ARTICLE 1. NAME AND OBJECTS

1.1 This organization is the “Kiwanis Club of ___________________________,” which is a member of Kiwanis International and exists only by charter granted by Kiwanis International.

1.2 The primary purpose of this club is to improve the quality of life for children and families worldwide by adhering to the Objects of Kiwanis International, which are:

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

ARTICLE 2. MEMBERS

2.1 Adults of good character and good community standing may be admitted to membership in this club by invitation or by transfer from another Kiwanis club upon no less than a majority vote of the board.

2.2 Members in good standing are entitled to all rights and privileges of the club. To be in good standing, members are obligated to pay the dues and fees provided in club policy and comply with any other criteria provided in club policy.

2.3 Members not in good standing may be suspended or removed by no less than a majority vote of the board. At least fourteen (14) days previous notice of such pending action must be provided to the member. The member will have the right to appear to present his/her case to the board on or before the meeting at which action will be determined.

2.4 A member may resign by submitting written notice to the club. Any member who resigns or has been removed from club membership forfeits all interest in any club funds or property and all rights to use any Kiwanis marks.

ARTICLE 3. OPERATIONS

3.1 The administrative and fiscal year of this club is the same as Kiwanis International, which is October 1-September 30.
3.2 The board will determine the frequency, day, time, and place of regular club meetings, no less than once each month. Special club meetings may be called, and scheduled meetings may be cancelled or rescheduled, by a majority vote of the board or club members, provided at least 48 hours previous notice is given. Subject to laws of local jurisdiction, club members may meet and conduct business by any method that allows all participants to simultaneously communicate with each other or as otherwise allowed by law. Participation constitutes attendance. Normal club meeting rules apply. If any votes taken verbally are unclear, they should be taken by roll call.

3.3 One meeting each year between January 1 and May 15 will be designated as the annual meeting for club elections. At least 30 days previous notice of the annual meeting must be given to members.

3.4 This club may have standing committees as determined by a majority vote of the board and defined in club policy. The president may create and appoint additional committees as desired to conduct club goals and activities, subject to approval by the board, with their purpose, term, and duties defined upon creation.

3.5 At least one-third (1/3) of the club members in good standing constitutes a quorum, and no less than a majority vote of the members present and voting is required to approve all business unless otherwise provided in these bylaws or club policy. At least fourteen (14) days previous notice of any pending vote must be given to the members.

3.6 This club may host activities to inform club and community members about matters of public interest. However, this club will not express any opinion or take any action regarding any candidate, legislation, or other matters of a political nature.

ARTICLE 4. OFFICERS AND DIRECTORS

4.1 The officers will be a president, immediate past president, president-elect, treasurer, and secretary. The officers may also include one or more vice-president(s), if so defined in club policy. This club will also have a minimum of three (3) directors as stated in club policy. No offices may be held by the same person except those of secretary and treasurer, and no person shall simultaneously serve as an officer and a director. This club may also have such other offices as may be required by the laws of local jurisdiction. The names, terms, and duties of such offices, as well as the processes for elections and filling of vacancies, will be included in relevant provisions of the club’s bylaws and/or policies.

4.2 Officers’ duties are as defined below and as may be additionally provided in club policy:

- The president acts as the club’s executive officer; presides at all meetings of the members and the board; and regularly reports to both groups.
- The secretary keeps the club’s records; promptly reports membership changes to Kiwanis International; keeps minutes of club and board meetings; files required reports (if any) with local, national, and other government authorities; and regularly reports to the members and board.
- The treasurer handles and accounts for all club funds on authority of the board; maintains club financial records; and regularly reports to the members and board.
- The president-elect, immediate past president, and vice president (if any) have duties as usually pertain to the office or as may be assigned by the president or board.

4.3 Directors have such duties as usually pertain to the office or as may be assigned by the president or board.
ARTICLE 5. ELECTIONS AND VACANCIES

5.1 Each officer and director (and nominees for same) must be a member in good standing with this club. Any qualified, consenting member may be nominated either in advance or from the floor, according to club policy.

5.2 The immediate past president is the most recent president willing and able to serve. The secretary may be either appointed or elected, as provided in club policy. All other officers and directors, including the secretary unless he/she is appointed, will be elected at the club’s annual meeting by a majority vote, following a process provided in club policy.

5.3 The president, immediate past president, president-elect, treasurer, secretary, and vice president(s), (if any) will serve one-year or two-year terms as provided in club policy, beginning October 1 of each year. Directors may serve up to three-year terms, as provided in club policy, with each term beginning October 1 after election.

5.4 Vacancies will be filled as follows:
   • President: by the president-elect, immediate past president, or vice president (if any), as provided in club policy.
   • Immediate past president: by the most recent president willing and able to serve.
   • For all other officers and directors, new elections will be held within 60 days, provided at least fourteen (14) days previous notice of the meeting and nomination(s) is given to the members. However, if the secretary is appointed, the president will appoint someone to fill the vacancy, subject to approval by the board.

ARTICLE 6. BOARD OF DIRECTORS

6.1 The club board of directors (referred to in these bylaws as “board”) consists of the president, immediate past president, president-elect, treasurer, secretary, vice president(s) (if any), and all directors, and such other positions as may be required by the laws of local jurisdiction.

6.2 The board has the following responsibilities:
   • Provide general management of the club not otherwise delegated to the membership in these bylaws or club policy.
   • Assure the club complies with applicable governmental rules and regulations.
   • Determine the good-standing status of members in accordance with club policy.
   • Perform other duties as provided in these bylaws and club policy.

6.3 A majority of the members of the entire board constitutes a quorum, and a majority vote of the board members present and voting is required for all business unless otherwise provided in these bylaws or club policy.

6.4 The board will meet regularly at a designated place and time that it determines. The board may hold special meetings at the call of the president or a majority vote of the board, provided at least forty-eight (48) hours previous notice is given to board members of the date, time, place, and topic(s). Subject to laws of local jurisdiction, the board may meet and conduct business by any method that allows all participants to simultaneously communicate with each other or as otherwise allowed by law. Participation constitutes attendance. Normal board meeting rules apply. If any votes taken verbally are unclear, they should be taken by roll call.

6.5 The board may take no action in conflict with an action of the membership. Other than disciplinary measures, an action of the board may be rescinded or amended by two-thirds (2/3) vote of the club members present and voting, provided at least fourteen (14) days
previous notice is given to the members.

**ARTICLE 7. DISCIPLINE**

7.1 “Conduct unbecoming a member of the Kiwanis family” is defined in Kiwanis International Policy as any conduct that:

- is incompatible with the best interests of the public or of members of the Kiwanis family; or
- tends to harm the standing of Kiwanis in the local or global community.

7.2 If a written allegation of “conduct unbecoming a member of the Kiwanis family” is made against a member of a Kiwanis club, the club president shall immediately request from Kiwanis International a copy of the detailed procedures to be followed by clubs and shall appoint a special investigator to investigate the matter (or, if the club president is accused, the immediate past president shall act).

   a. If the investigation concludes that there is a reasonable basis for the allegation, the president shall notify the accused member and refer the matter to the club board to conduct a hearing to decide the matter. The board shall then meet and report its decision, whether the member did or did not engage in “conduct unbecoming” and, based on that decision, the appropriate disciplinary action, if any, as follows: informal counseling, a verbal reprimand, written reprimand, suspension from office or club membership, or removal from office or club membership. The determination of the discipline should be based on the seriousness of the unbecoming conduct. All disciplinary actions shall be documented in club records. If a member is removed from the club for “conduct unbecoming”, the club shall notify the district governor and district secretary as a matter of record.

   b. If either the accused member or the investigator believes that some part of the investigation or determination process was faulty or the determination was incorrect, either party has the right to appeal in writing the board’s decision(s) to the club membership. The appeal shall be heard at a special meeting of the club members in good standing. The decision of the club membership to uphold, reverse or change the board’s decisions(s) shall be final.

   c. If, at any point during the “conduct unbecoming” process, possible criminal wrongdoing is discovered, the matter shall be reported to the proper authorities.

   d. All materials, facts, and information related to the investigation, determination, and appeal (if any) shall be kept confidential at all times by any parties or persons involved in any part of the process.

   e. The club shall retain all official records on the matter (allegation report, investigation report, hearing record, board report, and appeal record if any) in a confidential file as long as required by applicable law, and shall send a copy to the Executive Director of Kiwanis International, to be retained in a confidential file.

7.3 A club shall discipline any member whose conduct is determined by the club to be “conduct unbecoming a member of the Kiwanis family,” or else the club shall be considered out of compliance with acceptable standards of Kiwanis International and may have its charter suspended or revoked as provided in the Kiwanis International Bylaws.

7.4 If an officer or director is alleged by the president or a majority vote of the board to be failing to perform his/her duties, the board will investigate the allegation and determine the matter at a special meeting in executive session held within forty-five (45) days after the investigation is
complete or as soon as reasonably possible. Written notice of the allegation, investigation, and meeting must be given to the accused member at least thirty (30) days prior to the hearing. The accused member will be permitted to attend the hearing and present a defense. If the allegation(s) is sustained by no less than a two-third (2/3) vote of the entire board, the position will be declared vacant.

**ARTICLE 8. FUNDS AND ACCOUNTING**

8.1 Monies received for club service activities, regardless of source, may be used only for service activities. Separate accounting records must be maintained for service funds and administrative funds.

8.2 By October 15, the board will adopt separate budgets of estimated income and expenses for the administrative and service funds of the club.

8.3 The club’s financial records will be examined annually by either (a) a qualified accounting firm not affiliated with any club member; or b) a standing financial review committee, as provided in club policy. The club’s accounting records will be available for inspection by the accounting firm or the committee and, upon request, by the president or board. A written report of the annual financial examination shall be submitted to the board.

8.4 The board determines the official depository/ies of club funds and designates the person(s) authorized to pay club charges.

8.5 Club membership dues, fees, and other assessments, as provided in club policy, must be approved by two-thirds (2/3) vote of the members present and voting, provided at least fourteen (14) days previous notice of the vote and proposed amount is given to the members.

8.6 The club board will provide for the prompt payment of all dues, fees, and other obligations to Kiwanis International and to its district and federation (if any).

8.7 If this club ceases operations for any reason, the club board will provide for proper distribution of club funds or other assets, in accordance with applicable law. Funds or assets not otherwise designated will be transmitted to the Kiwanis International Foundation or the district foundation.

**ARTICLE 9. AUTHORITIES**

9.1 This club’s bylaws and policies will comply with all applicable laws in its local jurisdiction.

9.2 For authority on all matters not covered by these bylaws, the following documents will apply, in this order of priority:

- First—Kiwanis International bylaws;
- Second—Kiwanis International policies and procedures;
- Third—Federation bylaws (if any)
- Fourth—District bylaws (if any)

**ARTICLE 10. BYLAWS AND POLICIES**

10.1 This club will incorporate or register as required by law with the proper government authority(ies) within one (1) year from its charter date and maintain such incorporation or registration.

10.2 These bylaws will only be amended to comply with the Standard Form for Club Bylaws, as approved now or in the future by Kiwanis International. Amendments may be adopted by
two-thirds (2/3) vote of the club members present and voting, provided at least fourteen (14) days previous notice is given to the members. These club bylaws and any amendments thereto are not effective unless approved by Kiwanis International.

10.3 If any provision of these bylaws is determined to be invalid, all other provisions still remain in effect.

10.4 The club membership shall consider and adopt the mandatory club policies required by Kiwanis International, which complete provisions stated in the bylaws. Adoption shall be by two-thirds (2/3) vote of the club members present and voting, provided at least fourteen (14) days previous notice is given to the club members.

10.5 The club board may adopt other club policies that are not in contravention of the applicable laws, club bylaws, Kiwanis International bylaws, and district and federation bylaws (if any) by at least a majority vote of the club board members present and voting, provided at least fourteen (14) days previous notice is given to the board members. (Note: Optional Policy L has special requirements for adoption.)

### Mandatory Club Policies

As stated in the club bylaws (Sec. 10.4): “The club membership shall consider and adopt the mandatory club policies required by Kiwanis International, which complete provisions stated in the bylaws. Adoption shall be by two-thirds (2/3) vote of the club members present and voting, provided at least fourteen (14) days previous notice is given to the club members.”

Policies A- F must be considered, completed, and adopted by the club and submitted to Kiwanis International for approval with the club’s bylaws.

**A. CLUBS DUES AND FEES**

*Notes: Use this policy to state the current amount of dues and other fees (if any) for your club.*

(a) The dues and new member enrollment fee amounts should include the current Kiwanis International dues and fees, district dues and fees (and federation dues and fees, if any). (b) If new members are alumni of Service Leadership Programs, clubs should not charge them for Kiwanis International dues for two years after joining the club. (See Bylaws Section 8.5 regarding how club dues and fees are set.

Members will pay the following financial obligations to the club:

1. Currency: _____________
2. Annual dues amount: ________
3. New member enrollment fee amount: _______
   
   Note: If the enrollment fee is graduated or pro-rated, then state that, listing the minimum and maximum amounts. Example: “Graduated monthly, from $10 to $40.”

4. Other amount, if any: Item: ___________________________________________________________________ Amount: 

   Note: Repeat line 4 for each ‘other amount’ and complete as appropriate.
B. MEMBERS IN GOOD STANDING

Note: Per Bylaws Section 2.2, this policy provides uniform definition of ‘member in good standing’ for all members of the same club.

A member is not considered in good standing with the club if he/she:

1. Is more than [choose one or both of the following by filling in the blank: ___ months -or- _____ (amount) in arrears on dues or fees owed by that member.

2. Optional: Other requirement(s):

   ________________________________.

   Note: This is where your club may list requirements, if any, which are not related to dues or fees. However, be cautious about listing other requirements, which must be enforced uniformly among all members.

C. OFFICERS AND DIRECTORS

Note: Complete the fields listed below as appropriate. (The provisions in this policy refer to Bylaws Sections 4.1 and 5.4.)

1. This club has [state number] ___ offices of vice-president. Note: If your club has one or more offices of vice-president, state the number. If your club does not have the office of vice-president, state “0” (zero).

2. This club has [state number, three or more] ___ directors. Note: A minimum of three directors are required. There is no maximum number.

3. A vacancy in the office of president shall be filled by [check only one] ___ the president-elect -or- ___ immediate past president -or- ___ the vice president*. *Note: If your club has more than one vice president, this shall be assumed to be the first vice president.

D. OFFICERS AND DIRECTORS TERMS

Note: Per Bylaws Section 5.3, choose the appropriate number of years as the term for each officer or set of officers.

Officers and directors terms are as follows:

1. President, president-elect, immediate past president, and secretary (if appointed by the president): [check one] ___1 year -or- ___2 years.

2. Secretary: [check one] ___1 year -or- ___2 years. Note: If appointed by the president, the secretary should have the same length of term as the president.

3. Treasurer: [check one] ___1 year -or- ___2 years

4. Vice-president(s) (if any): [check one] ___1 year -or- ___2 years

5. All directors: [check one] ___1 year -or- ___2 years -or- ___3 years. Note: If either 2- or 3-year terms are chosen, the directors will be elected so that only one-half or one-third of the terms are elected each year.

E. OFFICERS AND DIRECTORS ELECTION PROCESS

Note: Per Bylaws Article 5, each club must adopt a written process for nomination and election of club officers and directors. The following process states the basic requirements for nominations and elections. The club may add requirements at its discretion (deadlines, special forms, nominating committee, etc) or as may be required by local law.
The election process for this club is as follows:
1. The club secretary will be [check one] _appointed by the president and approved by the board -or- _elected by the membership. If the club secretary is not elected, he/she will be appointed within one (1) week after elections are held. Note: If the secretary and treasurer position are combined, the position should be elected, not appointed.
2. Volunteers will be appointed to prepare the ballot, count the votes, and certify the results.
3. Nominations may be made in advance or from the floor during the annual meeting, with the consent of those nominated.
4. Cumulative voting is not allowed. Absentee ballots [check one]: __are -or- __are not allowed. Proxy ballots [check one]: __are -or- __are not allowed.
5. Ballots are only necessary when there are more nominees for an office than offices to be filled. If any ballot does not reflect a majority vote for one nominee, the nominee receiving the fewest votes will be dropped and a new vote taken for the remaining nominees; the same process will be followed until one nominee receives a majority of the votes. If there are more nominees for directors than offices to be filled, those receiving the highest number of votes will be declared elected without additional voting.
6. Electronic balloting is permitted for club elections. Secure website balloting is recommended to ensure privacy and accuracy. Use the KiwanisOne Club Management System or consult Kiwanis International for guidelines.
7. The club secretary will certify the election results to Kiwanis International (and to the district and federation, if any).
8. Incoming officers and directors are referred to as “-designate” (examples: president-elect-designate, secretary-designate, etc).
9. Additional requirements (if any) used by this club are: ____________________________________________
    Note: Repeat line 9 for each additional requirement and complete as appropriate.

F. ANNUAL FINANCIAL REVIEW
To perform its annual financial examination as stated in Bylaws Section 8.3, this club: [check one of the following].
1. ____Hires a qualified accounting firm not affiliated with any club member; or
2. ____Has a standing financial review committee composed of two or more qualified* club members, excluding any board members. Selection of the members will be determined by vote of the [check one] ____ club board or ____ club membership. Committee members’ terms shall be for one year each, October 1 – September 30. It is recommended that committee members have staggered terms and that no person serve more than three (3) consecutive terms.

Note: An annual examination of financial records should include, but not be limited to, bank reconciliations, income, disbursements, budgets, balance sheets and income and expense statements for both the administrative and service accounts, budgets, and any other financial records or reports of the club.

*Qualified club members are those in good standing with the club who have financial or accounting experience.
Optional Club Policies

As stated in the club bylaws (Sec. 10.5): “The club board may adopt other club policies that are not in contravention of the applicable laws, club bylaws, Kiwanis International bylaws, and district and federation bylaws (if any) by at least a majority vote of the club board members present and voting, provided at least fourteen (14) days previous notice is given to the board members.”

The policies listed below are for consideration by the club because they may assist in club operations. However, they are not mandatory and may or may not be adopted, at the club’s discretion. Optional policies do not require approval by Kiwanis International.

G. OPTIONAL POLICY: CLUB MEETING INFORMATION

___ Check here if the club wishes to have this policy.
___ Check here if the club does not wish to use this policy.

Note: Per Bylaws Section 3.2, each club is required to meet no less than once per month. The club board determines the frequency, day, time, and place of regular club meetings. The club may use this policy to list club meeting information. However, this is not a reporting mechanism; if your club’s meeting information changes, please report it separately to Kiwanis International.

1. This club meets [select one]: ___ weekly ___ twice per month ___ monthly, as follows:
   Examples: “Every Monday at 11:30 am”; or “1st and 3rd Wednesday at 7:30 am.”
   ________________________________
   2. Club satellite meeting (if any):
      ________________________________

   Note: If the club has more than one satellite meeting, repeat line 2 and complete as appropriate.

H. OPTIONAL POLICY: ADDITIONAL DUTIES (if any) OF OFFICERS AND DIRECTORS

___ Check here if the club wishes to have this policy.
___ Check here if the club does not wish to use this policy.

Note: Per Bylaws Section 4.2, additional duties are not required, but may be added at the club’s discretion.

Officer’s and directors’ duties, other than those defined in the club bylaws, are as follows:

1. President: ________________________________
2. President-elect: ________________________________
3. Immediate past president: ________________________________
4. Secretary: ________________________________
5. Treasurer: ________________________________
6. Vice president (if any): ________________________________
7. Directors: ________________________________
I. OPTIONAL POLICY: STANDING COMMITTEES (if any)

___ Check here if the club wishes to have this policy.
___ Check here if the club does not wish to use this policy.

Notes: (a) Per Bylaws Section 3.4, list all relevant standing committees. Kiwanis International recommends each club have standing committees on Membership (covers growth, retention, education, and public relations); Programs (covers club meetings and special events); and Service and Fundraising (also covers community services, Service Leadership Program, and the Kiwanis International global campaign for children). These topics may be divided into separate committees. (b) If the club has opted for a standing Financial Review Committee in Policy F, you do not need to re-state that committee here.

This club has the following standing committees:

1. Committee name: ______________________________________________________
   Purpose: ______________________________________________________________________
   Duties: _______________________________________________________________________
   and such other duties as may be assigned by the board.

2. Committee name: ______________________________________________________
   Purpose: ______________________________________________________________________
   Duties: _______________________________________________________________________
   and such other duties as may be assigned by the board.

3. Committee name: ______________________________________________________
   Purpose: ______________________________________________________________________
   Duties: _______________________________________________________________________
   and such other duties as may be assigned by the board.

Note: If your club has additional standing committees, repeat the name, purpose, and duties lines above and complete as appropriate.

J. OPTIONAL POLICY: OTHER CLUB POSITIONS (if any)

___ Check here if the club wishes to have this policy.
___ Check here if the club does not wish to use this policy.

Note: Per Bylaws Section 6.1, use this policy to list any non-officer positions the club normally utilizes. If the club does not have or want any additional positions, disregard this option.

In addition to officers and directors specified in the bylaws and standing committees stated above, this club has the following other positions (such as administrative secretary, assistant treasurer, etc):

1. Position: __________________________________________   Term: ___ year(s)
   Duties: ______________________________________________________________________
   Who appoints or elects the position:

Note: If the club has more than one ‘other position,’ repeat the lines above and complete as appropriate.)
K. OPTIONAL POLICY: SPECIAL VOTE REQUIREMENTS (if any)

___ Check here if the club wishes to have this policy.
___ Check here if the club does not wish to use this policy.

Notes: (a) If the club wishes to require a vote on something not specified in the bylaws or mandatory policies, it should list it/them below. (b) Or, if the club wishes to require a higher vote than that stated in the bylaws or mandatory policies, it should list it/them below. (c) The requirement for such votes must first be adopted by each body they pertain to: the club board and/or the club membership. (d) If the club does not have any special items or higher vote requirements, disregard this option. This policy pertains to the Bylaws generally.

The vote required for particular types of business not covered in the club bylaws is as follows:

1. Type of business:_______________________________________________________________________
   requires [check one: __majority -or- __two-thirds -or- (other vote: state it here)__________] vote of the club [check one __board -or- __ members] upon [add number] ____________________ days previous notice.

Note: If the club has more than one special vote requirement, repeat the lines above and complete as appropriate.

L. OPTIONAL POLICY: SPECIAL MEMBERSHIP TYPES (if any)

___ Check here if the club wishes to have this policy.
___ Check here if the club does not wish to use this policy.

Note: Use this policy to state any special types of membership the club may establish. If the club has no special membership types, disregard this option.

   Clubs are urged to use caution and give thorough advance consideration before adopting any special types of membership. Adoption of special types of membership requires a three-fourths (3/4) vote of the club membership present and voting. Be aware that the only membership type recognized by Kiwanis International for dues, voting, or any other purposes is active (regular) membership and that full dues and fees must be paid by the club to Kiwanis International and the district (and federation, if any) for all members reported on the annual club roster, regardless of any discounts the club may grant for some membership types. All dues-paying members have the right of voting on club issues and holding club office or director positions, as provided in Section 2.2 of the club bylaws.

This club has the following special types of memberships with the stated criteria and benefits for each.

1. Special membership type (name):______________________________________________
   Special criteria:_______________________________________________________________________
   Special benefits:______________________________________________________________________

Note: If the club has more than one special membership type, repeat the lines above and complete as appropriate.
M. OPTIONAL POLICY: ADDITIONAL TOPIC(S)

___ Check here if the club wishes to have a policy on an additional topic(s).
___ Check here if the club does not wish to have a policy on an additional topic(s).

Note: A club policy on an additional topic(s): (1) may not be in contravention of other Kiwanis governing documents or applicable local laws; (2) should assist club operations in a strategic way; (3) should be long-term, lasting multiple years, until or unless changed or rescinded; (4) must be properly adopted as stated in Section 10.5 of the Standard Form for Club Bylaws.

POLICY
TITLE:____________________________________________________________________________

POLICY CONTENT:_________________________________________________________________

Note: Repeat the two lines above for each additional club policy and complete as appropriate for each.

ADOPTION AND APPROVAL
of Club Bylaws, Mandatory Policies, and Optional Policies

If you have reviewed your edited bylaws and policies and are ready to submit this version to Kiwanis International for review and approval, choose the date the bylaws and policies were adopted by your club and hit Submit. Once you hit Submit, your new bylaws and policies will display under Pending Approval on the Club Bylaws Management Center dashboard until they are approved by Kiwanis International. If you need to make unexpected changes after submission, you’ll have the option to un-submit this version, edit it, and re-submit it.

Submitting these bylaws certifies that the club has properly adopted them. Proper adoption requires a two-thirds (2/3) vote of the club members in attendance at a meeting announced for that purpose and at which at least a quorum of members was present.

CLUB ADOPTION

Date adopted by the Club: ____________________________

Club President or Secretary: ____________________________

KIWANIS INTERNATIONAL APPROVAL

Date approved by Kiwanis International: ____________________________

By: ____________________________
Planning a charter night silent auction

A silent auction is a great first fundraiser for a new club.

This event can:

• Promote the new club in the community
• Raise funds for a new club’s service account
• Offer an opportunity to invite additional members
• Increase attendance at charter night
• Provide the new club an event to rally behind
How to plan a silent auction

Select two coordinators to take charge of the auction.

1. **Create a basic solicitation letter** for donors on Kiwanis letterhead. See sample letter. Make the purpose of the auction very clear (i.e., new playground equipment, starting a Key Club in the local high school, etc.) so donors can see who will ultimately benefit from their donation. Let them know how their donation will be acknowledged during the event. For example, consider putting the donor’s company name in the program and displaying company information next to the item.

2. **Create a list of potential donors.** Considering who might attend your event, find items that might match their interests and buying potential. Include vendors that can provide physical items like stores, art galleries, sports teams or gift shops as well as certificates for services or free passes for events from spas, theaters, restaurants, wineries or hotels.
   
   **TIP:** Review the Chamber of Commerce membership list and/or the phonebook for ideas.

3. **Collect items for the auction.** Label and list each item with the donor’s name, contact information, product description and retail value. This will help you organize your items, set the starting bid price and send thank-you notes after the auction.

   **TIP:** Play up the presentation of services or gift services by using a basket or ribbons.

4. **Follow-up on letters** that did not generate a donation.

5. **Create bid sheets for each item.** Print extras in case there are last minute donations. (See sample on the back page.) You may wish to staple these to folders containing additional information about the item.

   **TIP:** A good rule of thumb is to set the starting bid for items is between half and 2/3 of the retail value.

6. **Publicize the auction** to charter night attendees beforehand. Let them know how and when to pay for any items they win.

7. **Running the auction.** Designate members to monitor the tables to answer questions and encourage bidding. If an item is not receiving bids, consider lowering the starting bid. (Since the item is a donation, any money bid is better than none). Periodically remind attendees how long items will be open for bids. There is usually more activity as time begins to wind down. When the auction closes, make an official announcement and collect the bid sheets. Announce the winners and inform them how to pay for and collect their item(s).

   **TIP:** If there are restrictions on the item like block out dates or expiration dates, make them known before attendees bid.

8. **Send thank you letters** to donors highlighting the success of the event. Include a copy of the printed program if one is created.
Dear neighbor:

On [date], we will celebrate the opening of a new service club in our community, the Kiwanis Club of [club name]. Kiwanis is a global organization of volunteers dedicated to improving the world one child and one community at a time. Our club is made up of people who enjoy the fun, fellowship and networking opportunities that Kiwanis offers, while giving back to our community.

We will hold our first fundraising event—a silent auction—in conjunction with our charter night celebration. One hundred percent of the proceeds will be used to fund service projects completed for the benefit of our community. For example, the first project we want to accomplish is [project description and impact].

Would you consider supporting our efforts to support the community by donating an item or service to our silent auction? Any donations made will be well acknowledged throughout the evening [insert more details].

Thank you in advance for your generous support. Please don’t hesitate to contact us for further information about Kiwanis or the event.

Sincerely,

Jane Smith, Co-Chairwoman
[phone]
[e-mail address]

Jim Jones, Co-Chairman
[phone]
[e-mail address]

Kiwanis Club of [club name]
Charter Celebration Committee

The Kiwanis Club of xxx meets [day] at [time], at [location] located at [address].
Kiwanis Club of [club name]
Charter night silent auction

Item #: _______________
Donated by: _______________________________________________
Retail value: _______________________________________________

Starting bid: $_______________ Item description: __________________________________

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Planning the charter ceremony celebration

The charter presentation ceremony is a celebration for the entire division. It is an occasion to recognize the new club and welcome its members, and also to thank those who helped open the club.

Role of the governor (who was in office on the organization date)
- Confirm a date with the lieutenant governor for the ceremony.
- Receive the charter and awards from Kiwanis International.
- Present the charter and awards during the ceremony.

Note: The governor signs the charter. Many districts have it framed.

Role of the lieutenant governor (who was in office on the organization date)
- Confirm a date with the governor for the ceremony.
- Complete the organization paperwork and submit fees to Kiwanis International.
- Appoint and advise a special planning committee for the event.
- Verify awards are ordered from Kiwanis International and that certificates are prepared.
- Encourage participation by all clubs within the division.
- Act as master of ceremonies for the celebration.

Scheduling
- Schedule the ceremony six to eight weeks after the club’s official organizational meeting.
- Submit all required paperwork to Kiwanis International at least six weeks before the ceremony.
- Mail invitations two to three weeks before the ceremony.

The invitation list
- Governor in office when the club organized
- Current governor, if different from above
- Clubs from the division
- Current and past leaders in the division
- Community officials served by the new club
- Local news media to cover the event (at least provide an announcement they can use)

The event
- The ceremony should be impressive but keep expenses for attendees reasonable.
- Take photographs for the district newsletter, the club’s files, the local newspaper, etc.
- Plan a fun and exciting event.

Suggested program
Prepare a printed program with the agenda and the names of the charter members.

Sample agenda
- Opening
- Meal (optional)
- Introductions
- Recognition of Kiwanians who helped organize the new club
- Governor’s remarks and presentation of charter and gifts to new club
- President’s acceptance of charter and remarks
- Recognition of charter members
- Remarks by community official (optional)
- Closing
PUBLIC RELATIONS TOOLKIT
This public relations toolkit will provide you everything you need to share what your new or existing club is doing in your local community. You’ll educate your community about Kiwanis and club activities. You’ll represent Kiwanis as a spokesperson by promoting special events. You’ll also tell the larger story of Kiwanis International and the impact we make on communities around the world. And, you’ll help create public awareness about the Kiwanis brand. Remember, all external communication is branded Kiwanis. This keeps your message simple and easy to understand!

We’ve designed this toolkit to make your job as easy as possible. New clubs will find resources to publicize special milestones—the charter ceremony, first fundraiser, first service project and first membership drive—to help raise awareness about the new Kiwanis club and its mission. Existing clubs will find resources to publicize service projects and fundraisers to raise awareness about your club and its mission.

Enthusiastic local participation will be the key to your success. We encourage you to customize these materials to fit your club. Feel free to contact us along the way for help, feedback and advice at pr@kiwanis.org.
CONTENTS

• Getting started
• How to build a media list
• Media relations
• Interview training
• Capturing clips
Your Personal PR “Kit”
No one knows Kiwanis better than you do! Enclosed you will find your own virtual public relations toolkit to help you turn that knowledge into relationships with members of the news media. You’ll find everything you need to be successful at telling the Kiwanis story to your local media.

Remember, the more publicity you attract, the more you’ll share the Kiwanis story with your community, and the more potential new members you’ll attract. Be sure to review the kit and customize the materials for your club and for your community.

We’ve included the following materials:

Public relations training
1. **How to build a media list:** To start spreading the word, you’ll need to build a local media list. *Before you start publicizing, you need to find out who should receive these materials. This is the first step to getting great publicity.*

2. **Media relations:** This document will walk you through the best ways to approach the media and give you tips to make sure your pitch and story idea stand out.

3. **Interview training:** This document will help you prepare for in-person and phone interviews with the media, and it provides tips for use before, during and after the interview.

4. **Capturing clips:** This document will help you keep track of any media placements you secure and provides information on how to share clips with the Kiwanis International public relations team.

5. **Website:** Visit www.kiwanis.org for additional tools, such as the templates listed below, the Kiwanis logo and brand guidelines.

Templates and tools
1. **Media alert:** This media alert will help you inform your local media about special events, such as the chartering ceremony or the first service project. Send these out one to two weeks leading up to your event.

2. **Press release:** This news release is a great way to spread the word about your new club and what it will do for the local community. You’ll see we’ve made it easy to customize with your information; all you need to do is fill in the highlighted areas. We’ve also left a placeholder for a quote from a charter club member. Existing clubs can also use this template to announce a new club focus or a new signature project.

3. **Just the Facts:** This document can be sent to the media along with your press release. It’s a quick overview of Kiwanis International.

>>Next section: How to build a media list
To spread the word about Kiwanis and to build buzz in your local market, you need to know where to begin—and with whom. The best way to start is by building a media list. Here’s how.

1. **Build your media list the same way you would build your professional network.** Relationships are the best starting point when pitching your story. Think for a minute about who you know. Do you have any contacts on staff at the local newspaper or TV/radio stations? Do you know anyone else who might? If so, those contacts might help you get your foot in the door. And if the media professionals you contact say they aren’t the right reporter or editor, they’re usually kind enough to refer you to the appropriate person.

2. **Identify the media outlets that might be interested in your story, and start to make a list.** Think about the following types of media that are in your town or within a radius of about 30 miles. For smaller towns, you might want to opt for a larger radius.
   - **Print (magazines and newspapers):** What is the biggest newspaper in town? Does your community/neighborhood have a smaller newspaper as well? How about a city or regional magazine that focuses on what people are doing in your community? Try to focus on the biggest media outlets in your club’s community, as well as any neighborhood publications close to your club.
   - **TV:** What are the major TV stations in town? Do they have morning or midday shows that feature interesting events or organizations in your community? Do any TV news anchors specialize in philanthropy or service—and for that reason have a natural interest in your story?
   - **Radio:** Your club’s project or event would make a great interview opportunity for radio morning shows. Think about the most popular radio hosts in your town. Would they be good fits for a philanthropy or service story? What morning shows do you listen to in the morning?

3. **Once you’ve identified media outlets, check each outlet’s website for contact information.** Many stations list contact information for a newsroom, editor or reporter. Search for email addresses and phone numbers to add to your list.

4. **Identify the right contacts at each media outlet.** Your contacts will have different titles based on media type:
   - **Print (magazines and newspapers):** Regional magazine editors, newspaper volunteer section or philanthropy section editors. At smaller newspapers, ask for the name, phone number and email address of the managing editor or special sections editor.
   - **TV:** News assignment editor, as well as the producers of the station’s morning, midday and/or talk shows.
   - **Radio:** News director, producer of the station’s morning and/or talk shows. Be cautious about approaching “shock jock” stations that may not handle your news in a tasteful manner. Usually, news or talk stations are more receptive to pitches because they have more room for stories that are not timely or “breaking” news.
   - **Online:** If the website is run by one individual, you only have one option. If you are targeting an online news site, look for someone who covers community news.

   *Note:* Do not contact the advertising department with a story idea.
5. **If you can’t find a particular reporter’s email address or phone number on the website, start making phone calls.** Ask the receptionist or newsroom contact for the correct person to approach regarding philanthropy or service. Keep records of everyone to whom you talk, and make sure to get the correct spelling of names, email addresses and phone numbers.

6. **Understand how much time (“lead time”) various media outlets need when you distribute press materials to the people on your list.**

   - Daily and weekly newspapers, radio stations and television talk shows usually require about two to three weeks’ notice.
   - Magazines usually prefer a few months’ notice, so don’t expect to see coverage right away. Since most city magazines set their own print deadlines, it’s best to simply call and ask how much advance notice they require on a story.
   - Local television and news assignment editors prefer only a week or a few days’ notice.
   - Online sources can post items very quickly, so send the information a few days or a week in advance.

Congratulations on building a great media list! Now it’s time to get your information ready to send to everyone on your list.

>>**Next section:** Media relations
MEDIA RELATIONS

We appreciate your efforts to raise awareness about your Kiwanis club. Every opportunity to further Kiwanis’ brand awareness and highlight your club will create opportunities to build membership!

Once you’ve created your media list, pitch your event to create public awareness opportunities. Be sure to use the customizable templates!

Using a new club opening as an example, here’s how:

- New-club announcement: Write and distribute press release announcing new club.
- Charter celebration ceremony: Write and distribute media advisory.
- First fundraiser: Write and distribute media advisory prior to event. Use the press release to summarize the event’s success.
- First service project: Write and distribute media advisory prior to event. Use the press release to summarize the event’s success.
- Membership drive: Write and distribute media advisory.

Be sure to send out your media materials via email and follow up over the phone with your contacts to encourage them to “spread the word.”

A step-by-step checklist

1. **Customize the press release or media advisory.** We’ve provided you with a “shell” of a release that includes details about Kiwanis. Now you just need to fill in the release with your localized information (community facts, what you’re doing for an event, your contact information, etc.) and you’re ready to go! Remember: The more local the story, the more appealing it will be to the media.

2. **Distribute your customized press release or media advisory to your media list.** Email is probably the best and easiest way to send your information in a timely and cost-effective manner. Do not send the release only as an attachment in your email. Copy and paste the it into the body of the email, and include any additional information as an attachment. Consider a catchy subject line to make sure it doesn’t get lost in their inboxes. Be brief, get to the point and emphasize the local angle—but don’t be afraid to be creative.

3. **Make follow-up calls.** After you’ve distributed your media materials, pitch your story idea to your media contacts. If you email the information, you can begin making your follow-up calls the very next day and subsequent weeks thereafter.

4. **Be efficient.** When making calls to your contacts, remember:
   - Reporters, editors and producers are almost always working against deadlines, so keep your conversations brief and to the point. The best time to reach print reporters is usually before 3 p.m. (unless the newspaper is an afternoon paper). Television reporters and assignment editors are usually available to discuss story ideas between 10 a.m. and 2 p.m.
   - Don’t ask, “Did you receive the materials I sent?” Reporters hate this question. Try saying, “I sent you information a few days ago. I’d be happy to tell you more and get you additional details if you’re interested.”
Be prepared to talk about your story. When you’ve got your media contacts on the phone, it’s a great opportunity to explain more about any events or fundraisers you’re hosting.

5. **Think about what the media really want.** Overall, the media love local stories—what’s happening to people in their community, how it fits into an overall national trend, what impact it has on other people in town, etc. That’s where your story will resonate the most. If you remember three things, remember these three: local, local, local.

In addition, different media outlets respond to different key points. For example, television news programs respond to visual scenes, so make sure you send them visuals—such as photos or even videos—to use as well. Radio stations respond best to one-on-one interviews, so mention that you could come in for an in-studio interview or be available for a live phone interview. Print contacts usually ask for the most detail and for statistics to prove the validity of your story. Print contacts also appreciate visuals.

6. **Realize you might have to re-send the information.** Newsrooms are hectic places, so don’t be surprised if your contact mentions he or she has misplaced the news release, or that the materials have been routed elsewhere. Be prepared to send another copy.

7. **Meet deadlines.** While your contacts already have the news release, they may require additional information or want to interview you for a longer story. Always return phone calls and requests for information in a timely manner. Most publications have specific issue dates and deadlines that cannot be extended.

8. **If the media respond, be ready.** Read and review your message points. And remember, media relations is a lot like sales: You may have to talk to many people to close just one deal. But it’s worth it—one local story gives thousands of people an opportunity to learn more about your Kiwanis club.

>>Next section: Interview training
If a reporter or editor is interested in a story about Kiwanis, he or she may want to interview you in person or over the phone. Interviews are a perfect opportunity to share your messages with the public, so make sure you’re prepared.

**Before the interview**

1. **Get as much information as possible about the interview.** Most reporters will share what they hope the article will discuss—and what they hope you will bring to the story.

2. **Know your key messages.** The better acquainted you are with the messages you want to deliver, the more easily your story will flow. Don’t memorize a script, but try to make the words your own. Practice answering questions in a quiet space at home or even in front of a mirror. The more you speak your key messages out loud, the more comfortable you will be when it’s time to answer questions.

3. **Rehearse with a fellow club member, friend or coworker.** This may sound silly, but practice with another person helps you get comfortable using the message points when you’re asked questions during the actual interview.

**During the interview**

1. **Pace yourself.** If the interview is for a television or radio station, ask whether the interview will be live or taped. Live interviews normally last only two or three minutes, and there is no opportunity for editing. A taped interview might last five or ten minutes, because the reporter will have time to edit the story before it airs.

2. **Think of the interview as a conversation.** You can even think of the reporter as a potential new friend—but be aware that the reporter’s main objective is an interesting story. Don’t share anything you don’t want to see in print or on television. That said, relax—the reporter isn’t an enemy. He or she knows you are a volunteer and promoting your club, and might want to help spread the word.

3. **Remember, the media like to tell stories in personal terms.** Think about the impact your club has had on your community or share a story of someone who inspired you.

4. **Weave key messages into your story.** You can make your points most effectively when you can use your personal experiences as examples.

5. **Relax and be yourself.** You don’t need to pretend you have information or expertise that you really don’t. If you don’t know an answer, just say so.

**After the interview**

1. Ask the reporter whether there are other facts or information he or she will need to complete the story.

2. Find out when the story will run—or ask for the reporter’s estimation.

3. Make mental notes about the interview—how it went and what you will do differently the next time.

4. Reward yourself for a job well done!
Additional tips for television interviews

- Know what you want to communicate, and don’t be afraid to repeat yourself. Live by your key messages.
- Short answers are better than long ones. Stop talking when you’re done making your point.
- This is not a confrontational interview. Why not smile while you’re talking? You’ll sound more enthusiastic.
- Don’t overlap the interviewer’s question. Begin your answer when he or she is finished.
- Speak in complete sentences.
- Avoid jargon, abbreviations and acronyms (e.g., SLP, ICON, etc.). Speak simply.
- Don’t repeat a negative. For example: If you were asked, “Aren’t you an alien?” you wouldn’t reply, “I’m not an alien.” You might say, “Actually, I’m from Cleveland.”
- Keep your hands free, open and animated. Gesture as you normally would.
- Plan what to say if asked, “Is there anything else you’d like to say?” You should recap each of your message points as a response.
- Always assume the camera is on.
- Resist the urge to lean into or grab the microphone.
- Television is an intimate medium. Speak in personal, anecdotal terms. Use analogies to illustrate your point. Don’t be afraid to tell “your story.”
- Body language is important for television. Practice by talking in front of a mirror. People will remember how they felt about you more than they’ll remember what you said.
- Mention your contact information and the website where people can go for more information.
- Remember, there is no such thing as “off the record.”

>>Next section: Capturing clips
CAPTURING CLIPS

It is important to monitor the news media (television stations, newspapers, etc.) for all coverage of Kiwanis International.

If you secure an interview or media placement, we would appreciate a copy of the result. Send it to pr@kiwanis.org. This will help us track the success of our work!

Tips for capturing clips

After your interview, ask the reporter whether he or she knows when the story will air or be printed.

1. Monitor the outlet’s website. You can usually search for a specific term within the site to find related articles. It is possible that the story will be published in print or air on TV or radio, but not be posted online. For this reason, it is important to follow up with the reporter to gather as much information as possible about when the story will air or be printed.

2. After you have completed an interview or secured a media placement, please send the following information to pr@kiwanis.org:
   - Date
   - Publication
   - Reporter
   - City
   - Your name
   - Your local Kiwanis club
Club scorecard

**Objective**: To measure the progress and effectiveness of your club’s community activities.

**Purpose**: To survey and track benchmarks linked to club success.

**Goals**: To use the feedback about club activities and administration to improve the club.

**Audience**: Board members

Club success depends on being attuned to community needs and member interests, as well as attention to administrative tasks, strategic planning and making a plan to continually invite others. Tracking key indicators of the club’s performance will help you stay focused on your desired results and allow you to see where you might have to make some adjustments.

Periodic assessment and reflection on these indicators will help the club evaluate its ability to meet the needs identified in the community.

**Find these totals on the club’s online monthly reports:**

- Membership totals
- Membership trends
- Service hours
- Fundraising totals

**Other useful information to track and periodically review:**

**Club management/administration:**

- **Club Leadership Education**: Has the club president, secretary or membership committee completed Club Leadership Education either online or in-person (denoted on www.kiwanisone.org/cle)?
- **Other leadership training**: Were the club’s committee chairmen, treasurer and board members trained prior to their year of service?
- **Strategic planning**: Did the board of directors establish or revise a strategic plan?
- **Financial review**: Was an annual financial review conducted by the treasurer and other members of the finance committee or an independent firm (if appointed)?
- **Election reporting**: Did the club secretary complete and submit a club election report?
- **Annual reporting**: Did the club secretary complete and submit the club’s annual report?
- **Dues payments**: Did the club treasurer remit the members’ dues payments in a timely manner to Kiwanis International and the club’s respective district?
- **District convention delegates**: Did the club send two delegates to district convention to vote in the House of Delegates?
• **Kiwanis International convention delegates**: Did the club send two delegates to the Kiwanis International convention to vote in the House of Delegates?

• **Succession plans**: Does the club have a plan for successive club leadership, particularly for presidents?

• **District and Kiwanis International leadership**: Are any club members participating in leadership positions above the club level, namely Kiwanis International or district offices or chairmanships?

**Membership strength:**

• **Added/deleted members**: How many members did the club added or lose during the course of the year?

• **Prospective members**: How many potential members visited club events to learn more about Kiwanis?

• **Diversity**: What are the demographics of your club in both age and gender?

• **Service by non-Kiwanians**: How many service hours did non-members donated to the club’s projects?

• **Retention**: What percentage of members started and finished the year with the club?

• **Sponsor a new club**: Did the club help spread Kiwanis’ mission to other communities by sponsoring another club?

**Community service impact:**

• **Visibility**: How often is the club mentioned in the local news and via social media?

• **Recognition**: How often are the club’s partners recognized via media, awards or celebrations?

• **Connections**: How many members are connected to the community through active participation on community or partner boards?

• **Total service hours**: Is the number of overall service hours committed by the club increasing or decreasing?

• **Service hours per member**: What is the number of overall service hours committed by the club divided by the number of members?

• **Fundraising money earned**: How much money is raised by each fundraiser?

• **Fundraising money spent**: Are the current fundraisers lucrative enough to sustain the club’s service projects?

**Member experience:**

• **Event attendance**: What percentage of members attended events (including service projects, fundraisers, special events and regular meetings)?

• **Educational attendance**: What percentage of members attended educational events such as divisional council meetings, district convention, the Kiwanis International convention or other district or divisional events?

• **Distinguished members**: How many members meet the distinguished-member requirements? (Check www.Kiwanis.org/KiwanisOne for the current criteria)

• **Joint events**: How many joint events has the club has conducted with community partners and sponsored Service Leadership Program clubs?

• **Celebrating milestones**: Is the club celebrating the progress on its goals at milestones?

Here’s one way you might keep track of these statistics. The columns are divided into quarters of the Kiwanis year.
## Club management/administration

Average member satisfaction survey score: ________

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<td>Strategic plan revised</td>
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## Membership strength

Average member satisfaction survey score: ________

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<td>Club diversity (age and gender)</td>
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<td>Service hours donated by non-Kiwanians</td>
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<tr>
<td>Sponsor a new club</td>
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Do these statistics make you wonder about how your club’s members feel about their experience? Consider one of the survey methods described in the [Measuring member satisfaction](#) tool to learn more.

## Community service impact

Average member satisfaction survey score: ________

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<td>Visibility of club in newspapers</td>
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<td>Frequency of partner recognition</td>
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<td>Member connections to other boards</td>
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Do these statistics make you wonder how your club could make an even bigger difference? Check out the [Analyzing your impact](#) tool for more ideas.
Member experience

Average member satisfaction survey score: ________

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<td>Percentage of members attending events</td>
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<td>Percentage of members attending educational events</td>
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<td>Celebrating milestones</td>
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What do these statistics tell you about your club?

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Creating the purpose

**Objective**: To renew or establish members’ commitment and passion to pursue your club’s purpose in the community

**Purpose**: To guide your thoughts and reflections about what your club represents, and to use those feelings to inspire action for change

**Goals**: To determine the niche for your club in the community, how success should be measured, and what members enjoy about their experience

**Audience**: Club members

Every organization needs to define its purpose — what it does and why it exists. A club’s purpose should:

- Brand the club’s identity
- Offer clarity to potential members and partnering organizations
- Help the club set goals and priorities
- Guide members and leaders in making decisions about service and fundraising activities

Members around the world affiliate themselves with Kiwanis because of a shared passion for improving their communities, particularly where children are concerned. And how they choose to do that varies depending on the needs of the community, the resources they have available, the interests of their members and the partnerships they form.

Whether planning a new fundraiser to build a playground or taking over a longstanding community event, the club’s actions should be guided by a purpose. Establishing this purpose describes how your club will accomplish Kiwanis’ mission of “Serving the children of the world.” More specifically, it will help your club deliver the “wow” that makes current and future members enthusiastic about sharing the club experience with others.

What is your club is known for? What is its purpose?

**Why do you serve?**

What do you love about your club? Have you ever told nonmembers what motivates you to serve? For that matter, have you told other members — or asked them?

Some group reflection at your next club meeting could be both eye-opening and motivational, helping to establish or revitalize your members’ commitment to the club’s purpose. At an upcoming club meeting, learn from each other’s inspirations and ideas. Use these prompts and questions to encourage members to share what makes the club special — and to think about the reasons, people and partnerships that will keep it going.
Community:
- I care about our community because:
- What community near us could benefit from a Kiwanis club?
- How can we make our community more aware of this club and all we do?
- Local organizations we should work with:
- People to invite to our club:
- What our community really needs from us:
- How can our club learn what our community needs most?

Possibility:
- Young people inspire me because:
- How do we inspire kids’ and other young people’s commitment to service?
- How can we keep our club strong?
- My club inspires members to get involved by:
- My dream…
  - for our club:
  - for our community:
- With five more members, our club could:

Pride:
- My proudest Kiwanis moment: (existing clubs only)
- The best way to describe our club to a potential member:
- I love this club because:
- I joined this club because:

Here are three ways you can involve club members in sharing ideas. Write one of the above questions on a note card then use one of these methods to structure a discussion:

1. **Build the future.** Divide club members into groups or pairs. Give each group or pair one note card. Allow ten minutes for discussion. Ask a spokesperson from each group to share responses with the club.

2. **Begin the brainstorm.** Choose an activity leader or note-taker. Give each member a note card or cards. Ask for volunteers to share their responses.

3. **Share the love.** Give each member a randomly selected note card. Ask them to write down or think of an answer during the meeting. Ask each member to share his or her response.

On an easel pad, consolidate the group’s answers to help determine the club’s purpose. These aspirations and thoughts represent members’ commitment to serving the community and improving the club. If consensus can be established, these ideas might serve as a framework for accountability and future goals. Discuss the next steps for any action ideas at your board meeting or a membership committee meeting.

If your club has ideas that can’t be achieved without support, consider looking for sponsors or partners. Take a look the Developing community partnerships tool for ideas about how to get started. If your members are learning about additional ways the club might help the community, see the tool Rediscovering your community for more information about one way to do this.
Measuring member satisfaction

**Objective:** To gather information to help the club better serve its members, the club can better serve its members.

**Purpose:** To clarify what members expect from Kiwanis service by surveying and tracking benchmarks linked to club success.

**Goals:** To improve the club experience based on members' input

**Audience:** Board members, with club members' participation where designated

The member experience is an important factor in determining the health and strength of a club. Members want to love every aspect of their club. They want to feel satisfied with the value that they get from contributing time, talent, and money. This tool is designed to help you gain member feedback and use it to make any needed improvements.

Begin the conversation using one of these options:

- **Interview members individually.** This method works well when trust among the group is strong and members feel comfortable about speaking honestly about their opinions. Give members the opportunity to speak candidly about their experience. Get to know what they are looking for in their future with Kiwanis. You might ask: What drives them to serve? What expectations do they have? How do they feel about being part of the club? What do they think of the meetings and opportunities for service? What type of impact do they feel the club could have in the community?

- **Use a member satisfaction survey.** This method allows everyone to have a voice—and if offered anonymously, to speak as honestly as possible. Adapt the following survey to obtain a general picture of how members feel about topics ranging from club administration to community service impact. Also include opportunities to provide feedback. You could distribute the following survey as a printed copy or collect electronic responses using an online survey provider.

- **Conduct an open forum.** This method may allow for more interactive discussion, if an unbiased facilitator can guide the reflections. However, some members may not feel comfortable speaking in this type of an environment. Generate discussion by prompting members with open-ended questions similar to the statements in the survey on the following page.

- **Conduct a visual assessment.** Tape up categories such as club administration, service impact, membership strength, and member experience on a wall. Underneath them, invite members to place sticky notes with comments about things they enjoy and things they want to change. Then read each of them aloud for the benefit of the group and discuss how the feedback can be incorporated into the club's activities.
Member satisfaction survey

This survey will help club leaders evaluate how effectively the club is meeting your expectations. Information gathered from it can help improve club operations, increasing the club’s service impact and visibility in the community.

What do you enjoy most about being a member of our club?
___________________________________________________________________________________________
___________________________________________________________________________________________
___________________________________________________________________________________________

What is our club’s greatest strength?
___________________________________________________________________________________________
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If you could change one thing about our club, what would it be? Why?
___________________________________________________________________________________________
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Rate the following statements about our club’s operations using this scale:
0 = Strongly disagree   1 = Disagree   2 = Neither agree nor disagree   3 = Agree   4 = Strongly Agree

Club management/administration

_____ I am satisfied with my overall experience as a member.
_____ Our club members and leaders work well together as a team.
_____ Our club has a clear purpose that guides our goals and accomplishments.
_____ I can articulate clearly and concisely the impact our club has in the community.
_____ Our club meets at a time and location that fits my schedule.
_____ The cost of membership is reasonable and provides value to me.

Total for this section:

Would you like to comment on any of your ratings? What ideas do you have for improvement?
___________________________________________________________________________________________
___________________________________________________________________________________________
___________________________________________________________________________________________
**Membership strength**

_____ Our club is just the right size for the impact we want to make.
_____ I feel comfortable asking colleagues and acquaintances to visit and join our club.
_____ I am inspired by how many opportunities our club offers to create an impact in our community.
_____ Guests are warmly welcomed and introduced at club events.
_____ Our club offers a variety of activities and opportunities to attract prospective members to join our club.

Total for this section:

[ ]

Would you like to comment on any of your ratings? What ideas do you have for improvement?

___________________________________________________________________________________________
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**Community service impact**

_____ Our club’s service projects are worthwhile, rewarding and impactful.
_____ Our club’s presence is visible and viewed as a major asset in our community.
_____ I am proud to be associated with the impact that our projects make.
_____ There is sufficient member interest in most of our projects.
_____ There is sufficient community need for most of our projects.
_____ Our club generates sufficient money to fund current and potential service projects.
_____ Our club’s fundraisers provide adequate revenue.
_____ The amount of revenue obtained from our fundraisers is reasonable when compared to the amount of time spent.
_____ Our club is a hands-on, service-oriented club whose members are willing to participate.
_____ Our club is an important advocate for children in our community.

Total for this section:

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Would you like to comment on any of your ratings? What ideas do you have for improvement?

___________________________________________________________________________________________
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___________________________________________________________________________________________
**Member experience**

- My opinion about service, fundraising and administration is valued.
- Our club meetings and events are enjoyable and fun.
- Club members are properly recognized for their efforts.
- Every club member is invited to use their talents on at least one committee.
- Our club takes appropriate time to celebrate and recognize club and member achievements.

Total for this section: ______________________

Would you like to comment on any of your ratings? What ideas do you have for improvement?

___________________________________________________________________________________________

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Total for all sections: ______________________

**Evaluate the results**

Identifying what your club needs to start, continue and stop doing during the coming year can help you develop and refine goals. Average out the results of your surveys to determine where your club falls, then share the findings with your members via email or through a presentation at a meeting.

**Is the club score 104 or more?**

Congratulations! The overall club experience is a great representation of how your club impacts your community and your members. Celebrate your success and think about how those successes can inspire opportunities for improvement. What are you doing well? How might those qualities bridge the gap between your club’s strengths and opportunities for improvement?

**Is the club score between 75 and 99?**

Good work! Build on the momentum of your club’s current strengths. Not sure where to start? Look at your club events. A guest’s first impressions mean everything. If the experience isn’t a good use of visitors’ time, they may think twice before returning. Review the areas with answers averaging 0, 1 or 2 and brainstorm about how to implement change.

**Is the club score less than 75?**

Thank you for your honesty. The first step toward making a change is acknowledging that change is necessary. Where do you start? Before actively inviting potential members, discuss how to make the experience members have more meaningful.
Search for solutions

- **Club management/administration**: Visit www.kiwanisone.org/leadertools for resources that will help club officers lead and counsel the club to become stronger and more service-oriented.
- **Membership strength**: Visit www.kiwanis.org/theformula for resources that will help you invite new members and improve your club.
- **Community service impact**:  
  - Take a look at another tool for improvement, called *Analyzing your impact*. It will help you think about how to improve your service and fundraising opportunities.  
  - Explore issues of Kiwanis magazine at www.kiwanis.org/magazine to browse ideas for service projects that other clubs have implemented.  
  - Talk to your community. Examine the tool called *Rediscovering your community*. Interviewing members of your community can help the club understand what needs exist and how community leaders believe Kiwanis could support them. This may also uncover opportunities for new partnerships or sponsorships. For help thinking about organizations your club could partner with, see the *Developing community partnerships* tool.
- **Member experience**: How often do you thank or recognize your members for a job well done? Read up on more ways to celebrate success by downloading the *Celebrating success* tool.
Developing community partnerships

Objective: To examine how to increase or expand your club’s partnerships and sponsorships

Purpose: To clarify what the community needs from Kiwanis and determine whether partnerships or sponsorships could help the club in addressing these needs.

Goals: To determine who the club might collaborate with, financially or otherwise, to make your impact bigger and better.

Audience: Board members, with participation where designated from club member

Does your club take advantage of partnering with others around the community? Developing relationships with others can make your club more connected, relevant and vibrant. Clubs that are connected have more opportunities.

Here’s how your club can start thinking about connecting with more agencies, organizations and businesses:

1. Use research and members’ networks to develop a list of groups that your club might collaborate with. Discuss whether each group is a potential sponsor or partner (or both). Sponsors give cash or in-kind materials or services in exchange for positive public exposure. In a partnership, both of you benefit from supporting each other’s activities with the resources each has available. Consider these questions:

   Based on your current club projects and target populations, who might you approach to ask about partnering with the club?

   ______________________________________________________
   ______________________________________________________
   ______________________________________________________

Which organizations could the club approach for sponsorships? Look for like-minded businesses that already sponsor social, educational or youth-oriented programs.

   ______________________________________________________
   ______________________________________________________
   ______________________________________________________

For more information about how to develop a solid sponsor for your club, take a look at our sponsorship toolkit.

Are there ways to improve the sponsorships and/or partnerships you already have?

   ______________________________________________________
   ______________________________________________________
   ______________________________________________________
Coexist
Organizations that are present in the community with whom a relationship might be beneficial

Relationships
Organizations the club has any kind of relationship with

Partnerships/sponsorship
Organizations with partnership or sponsorship potential (based on community survey results)

2. Conduct a community survey to determine where new relationships could be established and what needs your club can fill. Take a look at the Rediscovering your community tool to learn how to get started.
Rediscovering your community

**Objective:** To find out how the club can better serve its community

**Purpose:** To clarify what the community needs and how your Kiwanis club can help

**Goals:** To gain information that will help the club assess the potential for new partnerships, sponsorships and service projects

**Audience:** Membership committee, with participation where designated from club members

Community surveys help clubs gather data about what the community needs from people who care. They also help to identify how the club might partner with others to address those needs and strengthen relationships with community leaders.

A step-by-step process

This tool is designed to systematically lead you through a survey process designed to reveal information about your club’s service impact, partnership opportunities and possibilities for expansion. Schedule this survey annually—or any time the club has experienced significant changes in membership demographics or service interests.

**Step 1: Create contact lists**

Brainstorm to identify community members who could provide the most useful information. Consider these people:

- Club partners
- Members of other groups with which the club already has a relationship
- Community leaders
- Government officials
- Public safety officials
- School administrators
- Service Leadership Program faculty advisors and students
- Chamber of commerce leaders
- Librarians
- Members of the local media
- Hospital directors
- Members of faith-based organizations
- Key business owners
- Representatives of other organizations serving children (e.g., Boys & Girls Clubs)
- Residents or commuters (to gauge community needs in an impromptu interview)
Step 2: Identify team members

- Choose a partner or put together small teams for conducting interviews. Going in pairs can make the interview more comfortable, but also ensure detailed notes are taken.
- Keep impromptu interviews between five and 10 minutes, and scheduled ones under 30. Before conducting an interview, introduce yourself, your club and the purpose of the interview. Let them know that all questions are optional and they can take as much time as they wish to answer.

Step 3: Schedule and conduct interviews

Determine which team members will contact which people/groups—and the time frame in which interviews should be completed. How you conduct the interviews may take a number of forms. You could ask questions by email, over the phone or in person. When it’s over, ask for, but also offer, contact information so that you can follow up.

Whatever you choose, be prepared. Anticipate how the interview should go, and keep it focused. Capture their responses in one place, whether it’s in a notepad or on a voice recorder, tablet or laptop.

Below are some sample scripts and questions to guide you.

**Introducing yourself:**

*Hello, my name is _____________________, and I belong to the ____________________ Kiwanis Club. It’s good to meet you. Our club is very active in the community. We do projects like ___________________________________, but we want to see whether there are needs that we don’t know about. To do this, we are trying to gather opinions about what’s good about our community, as well as how it could be improved. Would you have five minutes to give me your opinion?*

*Great! Don’t feel like you have to answer every question, and take as much or as little time as you need to answer.*

**Potential questions:**

- What do you think our community does well? What do you like best about the community?
- What would make our community a better place to live, work and play?
- What are some unmet needs of our community? What things should we be most concerned about as a community?
- Which organizations or groups do you feel like are working to make our community better? Which are helping to improve children’s lives?
- What is your “wish list” for our community?
- On a scale of one to five with one being the lowest, how involved with the community would you say you’ve been in the last three years?
- How do you see yourself getting involved in improving the community?
- What do you feel are the greatest barriers to community involvement for you personally (if applicable) or for our community members?
- What do you feel would get people excited about volunteering in the community?
- Who do you feel are the most respected and influential people in our community?
- Who else would you recommend that we talk to about what we can do to help the community?
- Do you have any short-term needs that our club can assist with?
- Are there any long-term needs that you need community assistance or support with?
• What, if anything, is currently being done to address those needs?
• Do you have any questions, comments or final thoughts?

In closing: Be sure to offer a Kiwanis business card!

Thank you, ____________________, for your time. We really appreciate it. I’d like to exchange contact information so that I can follow up with you about [anything interesting or left unanswered]. If you think of anything, any need that we may have in the community that we didn’t talk about, please call me. Our club meets ____________________. We’d love for you to join us so we can fill you in on the ways Kiwanis is already active in the ______________________ area.

Follow-up notes

Community events that club members need to attend:
___________________________________________________________________________________________
___________________________________________________________________________________________

Media and marketing ideas:
___________________________________________________________________________________________
___________________________________________________________________________________________

Fundraising ideas:
___________________________________________________________________________________________
___________________________________________________________________________________________

Other people and/or organizations to contact:
___________________________________________________________________________________________
___________________________________________________________________________________________

Step 4: Debrief and reflect

Collecting the opinions and needs of community leaders does little good if they aren’t put to use.

After completing community surveys, make time for a debriefing session. Collect the input from the interviews and discuss ideas for potential new service projects or fundraisers, partnerships or sponsorships, and even potential new members at a membership committee meeting. Questions to keep in mind:

Was any information obtained suggesting need(s) for club action?
___________________________________________________________________________________________
___________________________________________________________________________________________
___________________________________________________________________________________________
Does the club have the interest and financial means to pursue new projects? (Take a look at Analyzing your impact for a few ideas on how to weigh the costs and benefits of potential and current projects.)

___________________________________________________________________________________________

___________________________________________________________________________________________

___________________________________________________________________________________________

Was there feedback about past Kiwanis service that should be addressed?

___________________________________________________________________________________________

___________________________________________________________________________________________

___________________________________________________________________________________________

How might the club contribute to resolving frequently noted community concerns?

___________________________________________________________________________________________

___________________________________________________________________________________________

___________________________________________________________________________________________

Are there people or organizations with whom you might create relationships? (Take a look at the tool Developing community partnerships for additional ideas about how to cultivate sponsorships and partnerships.)

___________________________________________________________________________________________

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___________________________________________________________________________________________

If you find that some of the issues warrant further discussion between community leaders and organizations, consider hosting a community forum bringing together a cross-section of influencers. Develop open-ended questions from the areas of concern identified during the community surveying. For example, “How can we engage our children in community improvement?” or “What do you believe is the top issue concerning our youth?”
DREAM BIG!

Based on the needs and the ideas you’ve generated, think about this:

If you could give your community anything, what would it be?

What would that service project look like? Is this the “signature service project” in which your club is currently engaged?

If “Yes!” – Can you make it even better?

If “No,” what steps can your club take now to see your new signature service project come to fruition by this time next year?
Analyzing your impact

**Objective:** To analyze the level of success for club’s activities, particularly the service projects and fundraisers

**Goals:** To improve the impact your club makes in the community

**Purpose:** To reflect on the costs versus the benefits of service projects and fundraisers and determine improvements needed.

**Audience:** Board and club members

Kiwanians serve to make an impact in communities around the world. But how do you know when you've made a difference? Do you count the number of smiles that graced the faces of the recipients? Do you tally the number of trauma dolls distributed? This tool will help you assess and prioritize how your time and resources are best spent on community needs.

Find the right fit: Analyze your service

How do you know if the service project you have in mind is relevant to the community? Use this chart to help organize your thoughts.

<table>
<thead>
<tr>
<th>Project (current and potential)</th>
<th>Cost:</th>
<th>Impact:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Financial</td>
<td>Time (in hours)</td>
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Here are some questions worth considering when evaluating a potential or current project:

- What community needs are unfilled? What role do community leaders envision the Kiwanis club playing? (If you haven’t done so already, see the resources **Rediscovering your community** and **Developing community partnerships** for information about how to conduct community surveys.)

- What does the club consider its niche in the community? Could this project fit that niche—and if so, how?

- How many lives does/could this project touch? Is the change you could make in their lives significant or empowering?

- Is there member interest in the project? Is involvement with a project like this something members are proud to be part of? How many members are/would be involved? How much of their time does it require?

- How much visibility could/does the club receive in undertaking this project?

- Is there potential for establishing partnerships or sponsorships with other organizations or agencies?

- How much does this project cost the club? Is the cost worthwhile when compared to the visibility gained and impact made?

- Would the project be more successful if the club had more members?

One way to visualize your options at a glance, prioritize your projects and share the results with club members might be with this matrix.

<table>
<thead>
<tr>
<th>High impact, low cost</th>
<th>High impact, high cost</th>
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<tbody>
<tr>
<td>Low impact, low cost</td>
<td>Low impact, high cost</td>
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</table>

**impact**

**cost**
Funding the right fit: Analyze your fundraising

Most projects require funds. That means fundraising activities are in order. Use this chart to weigh the costs against the returns of potential and current fundraisers.

<table>
<thead>
<tr>
<th>Fundraiser (current and potential)</th>
<th>Member interest (1-5)</th>
<th>Time spent (in hours)</th>
<th>Est. # of lives impacted</th>
<th>Visibility for club (1-5)</th>
<th>Total costs</th>
<th>Gross income</th>
<th>Net profit/loss</th>
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Here are some questions to help you decide which fundraisers to pursue:

- Does this effort support or promote our mission?
- Does this activity provide adequate revenue for projects?
- Does it provide significant revenue based on the number of volunteer hours invested?
- How else might the amount of revenue gained be increased?
- What is the potential for expanding the fundraiser?
- Are there partnership or sponsorship opportunities?
- How visible is the fundraiser? How much of the community does and could it reasonably involve?
- Does the visibility generate interest in our club and its activities and potential members?
- Does or could the club get media visibility before, during and after the event?
- Does this activity educate the public about our mission?
- Would the fundraiser be more successful if the club had more members?

If your club needs some inspiring ideas for fundraising, check out the service and fundraising ideas in the Resource section of The Eliminate Project website (www.theeliminateproject.org).
Creating club change

Member participation depends on the value members receive and the enjoyment they take from club activities. Excellent Kiwanis clubs combine a unique blend of quality membership experiences with meaningful, relevant service.

Ensure that your club’s formula for future success involves an assessment of projects. Provide members the results of the service and fundraising analyses conducted above (possibly also the member satisfaction survey and community analysis), so they get a full picture of the overall findings.

Consider the following questions with your members to determine what changes in club operations they are willing to make based on that information and help everyone come to decisions accordingly. Club leaders can use the results of this exercise to develop goals in the club excellence plan, confident they have buy-in from all members.

How you begin a conversation could take many forms.

- Interview members individually.
- Use a member satisfaction survey. (See the example in the tool Measuring member satisfaction.) Online survey platforms like Survey Monkey enable you to make the surveys more anonymous.
- Conduct an open forum at a club meeting.
- Conduct a visual assessment in which observations and thoughts are compiled on a chart like the following or written on sticky notes according to categories or questions.

<table>
<thead>
<tr>
<th>What works</th>
<th>Let’s stop</th>
<th>Let’s start</th>
</tr>
</thead>
</table>

Here are questions that may help you in considering possible changes and improvements:

- What are we doing now that works well? Can it be improved upon?
- What should we stop doing? Why?
- What should we start doing? Why?
- What steps does the club need to take to be able to accomplish these changes?
Planning for club excellence

**Objective:** To fulfill your club’s purpose and actions in the community

**Purpose:** To create a detailed plan with action steps, responsibilities and timelines

**Goals:** To clarify club objectives based on member interests and resources and community needs, as well as to measure success

**Audience:** Club members

Successful clubs have goals—and a plan to achieve them. Give focus to your vision of club excellence by aligning it with your annual goals. Try establishing SMART goals: **Specific,** **Measurable,** **Action-oriented,** **Realistic** and **Time-bound.**

**Specific:** What exactly does your committee want to achieve? Answer the questions which, what, who, where, when or why.

**Measurable:** Tracking progress keeps people motivated. Address how much or how many.

**Action-oriented:** Describe a result.

**Realistic:** Make the objective challenging but also achievable and relevant to your club. It’s okay to be optimistic.

**Time-bound:** Include a time limit. Deadlines inspire action.

For example, don’t just say: “Increase the number of service hours provided to the community.” Say: “Increase the number of service hours provided to the community by 10% by September 30.”

Time to act.

List some ideas for goals. Evaluate your ideas according to the level of confidence leaders have in completing the goal. Then prioritize the goals using the letters A, B and C, with A being the most important.

**Tip:** To avoid distractions, focus on no more than three goals.
What is a SMART goal you would like to achieve?

Goal 1: Priority: __________ Level of confidence: ______________
___________________________________________________________________________________________
___________________________________________________________________________________________

Milestones to celebrate: ____________________________________________

Goal 2: Priority: __________ Level of confidence: ______________
___________________________________________________________________________________________
___________________________________________________________________________________________

Milestones to celebrate: ____________________________________________

Goal 3: Priority: __________ Level of confidence: ______________
___________________________________________________________________________________________
___________________________________________________________________________________________

Milestones to celebrate: ____________________________________________

Once the goals are established, determining milestones for measuring progress can help keep morale up. Tracking progress publicly encourages ownership of the goal and gives you the opportunity to recognize individuals who contribute to club success.

Keep the goals visible to club leaders and members at all times.

What do you need to achieve these goals?

Tip: For best practices for your committees, see http://www.kiwanisone.org/leadertools.
• If a sponsor or partner would provide additional marketing or financial assistance to help your club achieve one of its goals, take a look at the Developing community partnerships tool.
• If one or more of the goals involves fundraising, consider the tips in Analyzing your impact.

You might use the following organizational system to hold various members of the club accountable. Determine how to achieve each goal you set, then assign each task to a club member who will make sure it happens.

Goal: ______________________________________________________________________________________
Committee: _________________________________________________________________________________
Action: _____________________________________________________________________________________
Target date:  ____________________________
People responsible: __________________________________________________________________________

Goal: ______________________________________________________________________________________
Committee: _________________________________________________________________________________
Action: _____________________________________________________________________________________
Target date:  ____________________________
People responsible: __________________________________________________________________________

Goal: ______________________________________________________________________________________
Committee: _________________________________________________________________________________
Action: _____________________________________________________________________________________
Target date:  ____________________________
People responsible: __________________________________________________________________________

Goal: ______________________________________________________________________________________
Committee: _________________________________________________________________________________
Action: _____________________________________________________________________________________
Target date:  ____________________________
People responsible: __________________________________________________________________________

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Resources

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THE FORMULA Kiwanis
Page 3 of 3
Hosting a membership drive

**Objective:** To increase the club’s capacity to serve its community

**Purpose:** To gain step-by-step guidance and strategies to increase membership

**Goals:** To create a culture of ongoing inviting

**Audience:** Membership committee, with club members’ participation where designated

When your members love their club, they’ll want to share that experience and invite others to be part of it.

One organized way of inviting members is holding a membership drive. A membership drive focuses the club’s efforts on inviting potential members to an event planned just for them. These three simple steps will help your club increase its membership this year.

**Step 1: Prepare**

**Two months before: Build your team**

Surround yourself with people who are committed to making the club bigger and better. Then seek approval from your club’s board of directors to conduct and fund a membership drive. (Some of the costs associated with a membership drive include postage, printing programs and meals.)

Appoint individuals to take on these tasks:

- **Project lead:** Coordinates the entire program, orients the team members to their responsibilities and monitors their progress
- **Attendance:** Develops the prospect list, arranges for printing and mailing of the invitations and ensures the attendance of members and guests.
- **Venue:** Establishes the meeting time, place and physical setup, including name tags and applications, and identifies greeters.
- **Program:** Arranges speakers and sets the agenda
- **Public relations:** Writes press releases and promotes the event to surrounding businesses
- **Follow up:** Touches base with everyone invited after the event to answer questions and assess their interest in joining

**Team members:**

<table>
<thead>
<tr>
<th>Project lead:</th>
<th>Venue:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attendance:</td>
<td>Program:</td>
</tr>
<tr>
<td>Follow up:</td>
<td>Public relations:</td>
</tr>
<tr>
<td>Greeter:</td>
<td>Greeter:</td>
</tr>
</tbody>
</table>
Two months before: Create handouts and purchase supplies

How many materials do you need? Let’s answer that question with another question: How many guests would you like to have? If you distribute at least 50 invitations, you may get as many as 15 to 20 guests attending your meeting.

- Order copies of the Join the club brochure from the Kiwanis Family Store. This free resource includes a membership application. Contact the store at +1-317-875-8755 ext. 411 or https://store.kiwanis.org/product/1367.
- Develop a brochure or handout describing your club’s activities.
- Purchase what you need to send invitations:
  - Invitations and envelopes or postcards
  - Stamps
  - Pens

Six weeks before: Plan your event

- **Pick a date and time.** Try to avoid competing with other high traffic community events or placing it too close to other club activities. Your club’s normal meeting day and time is ideal.
- **Pick a venue.** Your normal meeting place should serve you well unless it’s too small to accommodate the expected influx of people.
- **Pick a theme.** Think of something catchy and exciting.
- **Plan your meeting agenda.** Here’s a sample.

  1. **Modified call to order (3 minutes):** You might want to forgo some of the usual traditions used to open the meeting if they might make guests confused or uncomfortable. If you choose to keep any of them, like the pledge or a song, explain what you’re doing and why.
  2. **Meal (20 minutes):** Plan to pay for the meals of any guests.
  3. **Welcome (5 minutes):** Make introductions and give an overview of the evening. Ask members and guests to state their name and profession.
  4. **Club achievements (5 minutes):** Ask a dynamic speaker in your club to talk about your club’s Impact in the community.
  5. **Club plans (3 minutes):** Ask the club president to talk about your club’s upcoming projects and goals.
  6. **New member perspective (3 minutes):** Ask a new member to give his or her perspective about the club.
  7. **Club meeting program (20 minutes):** Invite a guest speaker who can inspire your audience to want to join your club to share in the membership experience and engage the local community. A representative of a group that recently benefited from the club’s generosity or service would be ideal.
  8. **Selling the Kiwanis experience (5 minutes):** Leave the final word to your club’s best salesperson, someone who can make a case that leaves the guests happy to fill out an application and join the club.

Event information:
Date: _______________________  Time: __________  Location: ________________________________
Step 2: Invite

**A month before: Develop a prospect list**

To get ideas for who to invite, check out the chamber of commerce list of businesses or conduct a roster analysis. However, the people most likely to join are those your members know well, such as:

- Friends
- Co-workers
- Clients
- Neighbors
- Family members
- Business professionals
- Other community leaders
- Church members

You’ll need each prospect’s full name, address, email address and phone number. Consider offering a prize to the member who can bring in contact information for the most prospects. A good rule of thumb is to aim for at least 50 names—generally only a third of those you invite will attend, and not every person who attends will join.

**Three weeks before: Mail out the invitation**

Mail a nice invitation or postcard to each prospect, including details about your club’s special guest day.

**One or two weeks before: Extend personal invitations**

After the letters have been mailed, divide up the list of invitees so that members can follow up with each person to extend a personal invitation (referencing their referral) and answer any questions. Keep record of any follow-up communications. Ask the member who made the referral to make reminder phone calls to each attendee a day or two before the event.

**On the big day**

- **Focus on hospitality.** The purpose of the meeting is to inspire guests to join with you in your quest to improve the world one child and one community at a time.
- Position greeters at the door to welcome everyone.
- Print name tags to aid conversation.
- Use place cards to guide the attendees to a seat between two Kiwanis members, and train those members about how to share the Kiwanis message and address concerns or questions.
- Set each guest’s place with an ink pen, a *Join the club* brochure with application, and a club brochure.
- **Keep it positive.** Leave club business for another meeting, and remind members of the importance of first impressions.
- Run a video or PowerPoint presentation of your club in action on a loop.
Step 3: Follow up

One week later: Touch base

Within a week, touch base with every guest by phone, email or a personalized postcard. Do the same for everyone who said they’d come but didn’t, inviting them to the next meeting. Don’t forget: the best person to invite a new member is a new member.

One month later: Welcome new members

- **Plan a new-member orientation**: New-member orientation helps new members understand what a great organization and club they’re committing to. Download the one-hour program from www.kiwanis.org/theformula and personalize it to reflect the club’s activities.

- **Install the new members**: Focus the meeting on the new members’ installation with a sincere welcome to your club and an emphasis on getting to know the new members. It’s a once-in-a-lifetime experience—why not treat it that way.

- **Assign mentors**: A mentor is often a stabilizing force, who serves as a familiar face and can encourage the new member to learn about the club, meet others and get involved with projects. Find a member—maybe the sponsoring member—who will take a special interest in helping the new member stay connected, especially in the first few months.

Don’t forget: Plan your next event

Now that you have refined the process, you can start planning the next membership event.

- Establish a timeframe for your next drive
- Add to your ongoing prospect list the names of those who said, “Maybe later” or who were out of town.
- Consider making your Service Leadership Program club(s) – or the need to establish one – the focus of your meeting. Include parents, teachers, and school administration in your list of prospects.

For a host of membership resources, visit http://www.kiwanis.org/theformula. If you still have questions, call 1-800-KIWANIS and ask for your district’s regional development strategist.
Celebrating success

**Objective:** To foster pride and encourage future action between community organizations and members

**Goals:** To make sponsors, partners and Kiwanians feel valued and appreciated

**Purpose:** To get ideas about when and how to recognize members’ contributions and behaviors

**Audience:** Entire club

People get involved when they know they’re doing something meaningful. They stay involved when their efforts are recognized. And what gets recognized gets repeated.

**Celebrate your members**

If your club doesn’t have an annual celebration, consider planning a formal or social event that is filled with fun, fellowship and recognition.

However, there’s no need to wait until the end of the year to recognize a job well done. Recognition is most effective when it is frequent and immediate. Make sure to consider the person being recognized when you show your appreciation. You may, for instance, choose to extend verbal praise (publicly and privately), give a note and small gift, smile and say thank you as often as possible or even plan a social get-together.

**Recognize your community partners**

Many of the successes in your Kiwanis club are the result of the relationships and partnerships your club has developed to support large-scale projects. Without this support, the impact and scope of these projects would be diminished.

Acknowledge your club’s partners and sponsors to:

- Inspire others to become involved.
- Build community support for future initiatives.
- Emphasize community service.
- Offer opportunities to highlight community issues.
- Demonstrate that one person can be an effective agent for change.
- Make those engaged in community service feel that they and their work are valued.
- Provide examples for the rest of the community.

Consider recognizing a partner or sponsor in any of these situations:

- **The achievement of a goal in which sponsors or partners played a significant role:** The goal may be an endpoint or a major milestone leading to the successful completion of a project or initiative.
- **A club event specifically to honor collaborators and partners:** Say thank you at a club meeting, a special dinner or another type of recognition event.
- **Special occasions:** These often provide the perfect vehicle for showcasing the hard work and dedication of community partners. Global observances such as Earth Day, Universal Children’s Day and Mandela Day present opportunities to praise those who work on the issues they represent.

Specific ways to honor sponsors and/or partners include:

- Publicly thank them, perhaps with a gift, donation or award, at a club event, community meeting or even in a radio or TV interview
- Mention or highlight them on your website and/or event posters
- Write a press release or article, and/or invite the press to an event
- Present a gift or award at a public event
- Host a party in their honor
- Present “community hero” awards
- Make a donation in the person or organization’s name to a local project
- Honor them with a one year dues-paid membership to your club
Kiwanis year overview

Throughout the year
- Encourage representatives from your Key Club to attend Key Leader weekends.
- On the 15th of every month: Submit your monthly report

October
- Club goals and budget should be approved at the board meeting (no later than October 15). The club president will send club goals to your lieutenant governor.
- Prepare for the lieutenant governor’s visit.
- Membership committee should submit a news release about the installation of club officers to the local newspaper. Encourage the chairman to publicize club news throughout the year.
- Consider any proposed resolutions or amendments to the Kiwanis International Bylaws that your club would like to have presented at the Kiwanis International convention. Submit your proposals to the Kiwanis International Office by October 31.
- Consider applying for a Kiwanis International Foundation grant by November 15.

November
- Submit dues to Kiwanis International by November 1
- Observe Kiwanis Family Month. Designate weeks to recognize the Circle K International, Key Club, Builders Club, Aktion Club and Kiwanis Kids clubs that your club sponsors.
- Take part in Giving Tuesday. For more information, check out www.kiwanis.org/foundation.

December
- Make plans to interact with your club’s Service Leadership Programs for January through May.
- Encourage members to attend mid-year conferences.
- Continue to encourage club members to register for and attend the Kiwanis International convention.
- Committee chairmen report progress toward goals at this month’s board meeting.

January
- Club president and club secretary should review first quarter club and board meetings; committee programs/projects; and involvement in division, district and Kiwanis International events and programs. Look for areas of success as well as needed improvements.
- Make plans for your club’s involvement in Kiwanis One Day.
- Conduct the annual club meeting/election of officers between January 1 and May 15. See pages 65–67 in the Leadership Guide for more details.
- Appoint membership chair and report with club elections.
- Nominating committee appointed at least five weeks before the annual club meeting.
February
- Make certain your Circle K International and Key Clubs elect and report new officers to your district and the Kiwanis International Office.
- The club treasurer or secretary-treasurer will file a Form 990, 990-N or 990EZ with the Internal Revenue Service (IRS) by February 15 (U.S. clubs only).
- Ensure your Key Clubs and Circle K International clubs are represented at district conventions.
- Remind Key Clubs and Circle K International clubs to attend their district’s education session.

March
- Ensure plans are completed for Kiwanis One Day participation.
- Review Kiwanis International award programs, as well as district, division and club award programs. Determine if your club is on target. Look for additional opportunities at www.kiwanis.org/recognition.
- Encourage club members who plan to attend the Kiwanis International convention to submit their registration forms at www.kiwanis.org/convention.
- Elect two primary delegates and two alternate delegates to represent the club at the Kiwanis International convention at least 60 days before the convention.
- Consider items of business to be proposed at your district convention.
- At least 30 days before your district convention, elect three delegates to represent your club at the event. Encourage the Circle K International and Key Clubs you support to attend their district conventions.
- Consider applying for a Kiwanis International Foundation grant by April 15.

April
- Ensure club involvement in Kiwanis One Day. Celebrate your successes!
- Elect two delegates and two alternates to represent your club at the Kiwanis International convention.
- Assist your Service Leadership Program clubs with end-of-year recognition activities. Invite club members’ parents and have Kiwanis membership materials available for them. Present mementos to outgoing officers and faculty advisors.
- Participate in Kiwanis International Foundation’s Skip-a-Meal.
- The incoming president should plan to attend the club leadership education session offered in your area. Contact district office for details.

May
- Finalize plans for delegates, alternates and other club members to attend the Kiwanis International convention.
- Consider items of business to be proposed at the district convention.
- Elect three delegates to represent your club at the district convention.
- Ensure your Circle K International and Key Clubs are represented at their conventions.
June

- The Annual Report of Club Elections is due June 1. The club secretary will file election results with the Kiwanis International Office and your district office online.
- Appoint membership chair and report with club elections.
- Review Kiwanis International award programs, as well as district, division and club award programs. Determine if your club is on target. Look for additional opportunities at www.kiwanis.org/recognition.
- Involve all successors in club operations and procedures and encourage early preparation for next year.
- Finalize plans for delegates and other club members to attend the district convention.

July

- Review club and member accomplishments and recognize contributions.
- Ask club members who attended the Kiwanis International convention to report to your club about the business that was conducted and their experiences.
- The president-elect should plan to accompany Builders Club, Key Club and Kiwanis Kids committee chairmen to visit the school principals to ensure the sponsored programs plans are made for the coming school year. Also, set up a meeting with the college/university officials on the campuses of your sponsored Circle K International clubs.
- Club president will plan the installation ceremony, which is usually conducted at the end of September or the beginning of October. Invite the incoming lieutenant governor to install incoming officers.

August

- Current officers will assist incoming officers with planning for upcoming year.

September

- Ask club members who attended the district convention to report to your club about the business that was conducted and their experiences.
- Installation ceremony scheduled for this month.
- Submit a club gift to the Kiwanis International Foundation by September 30 either online or postmarked by that date for appropriate recognition.
Glossary

**Achieving Club Excellence**: A set of tools designed to help clubs become healthier and stronger. These focus on ensuring community relevance, effective club administration and member satisfaction.

**Certified instructor**: Leads classroom education for club presidents or club secretaries.

**Charter date**: The date of the club’s chartering ceremony. The club’s anniversary is actually the organization date rather than the charter date.

**Club charter ceremony**: A celebration in honor of a new Kiwanis club’s entrance into the Kiwanis family at which the club’s official charter is presented.

**Club counselor**: Mentors and guides new and existing clubs to help them become healthy and strong.

**Club leadership education**: The education programs provided by Kiwanis International to educate club leaders and members. Club leadership education can be delivered in classroom education sessions or online e-learning courses.

**Club opener**: Drives the process of opening each new club, working in partnership with the certified club counselor and lieutenant governor.

**Club-opening tool**: An online resource that guides you through the process of opening a new club and reports your progress to others.
**Community exploration**: The process of examining potential sites using economic and demographic information to determine whether they are viable. If you are considering multiple sites, this process helps you to prioritize which site to work on first.

**Completed club**: A club becomes a completed club when Kiwanis International has received and accepted all required forms and payments and officially issues the charter certificate.

**Dual member**: A full member of two Kiwanis clubs. Dual members pay all dues and fees to both clubs. For a new Kiwanis club, the total number of dual and seed members is limited to five members. For additional information, refer to Kiwanis International Policy 302.3.

**Group meetings**: Primarily used in Asia and Latin America, this method of opening new clubs begins the process by talking to community leaders, who identify a list of individuals to invite to a series of group meetings, where presentations are made about Kiwanis’ impact. These collective meetings are where the club-opening team extends invitations to join Kiwanis.

**Lieutenant governor**: Leads the team in membership initiatives within the division by identifying potential club sites, connecting a sponsoring club to each potential new club and monitoring the progress of the division membership team.

**Master instructor**: Organizes classroom education sessions for the district including but not limited to club president and club secretary education. Also works in concert with the team of certified instructors in the district.

**New-member orientation**: A program designed to educate new members about how a Kiwanis club operates—and gives them a bigger picture of the organization.

**Organization date**: The date of the organizational meeting, which then becomes the club anniversary.

**Organizational meeting**: This is the official meeting which establishes the intent of the new service club to affiliate itself with Kiwanis International. At this meeting, the club bylaws are approved and the officers and board of directors are elected.

**Pre-organizational meeting**: The first of a series of meetings that a club conducts in the final stages of chartering. Whether this occurs over one or two meetings, the objective is to allow the prospective members to get to know one another and to provide them an orientation to Kiwanis and the process of organizing the club.
**Referral method:** Primarily used in North America, this method of opening new clubs begins the process by talking to community and educational leaders who offer referrals to other leaders with known interests in serving children. One-on-one meetings with each individual and a member of the club-opening team are used to get to know the individual’s interests and the community needs and extend invitations to Kiwanis.

**Regional development strategist:** Provides field training for volunteers opening a new club and support for those counseling existing clubs.

**Reported club:** A club becomes a reported club when Kiwanis International receives the new-club information sheet.

**Seed member:** A current and/or former member who is willing to become a member in the new club for the specific purpose of assisting the club during its first year. A new club should have no more than five seed members. For additional information, refer to Kiwanis International Policy 302.3.

**Service Leadership Program clubs:** Clubs sponsored by Kiwanis clubs designed to empower people at every stage of life to become competent, capable and compassionate leaders by helping them learn to help others. Kiwanis has clubs at every level of education, from elementary school to college, as well as for adults with disabilities. Kiwanis members have the privilege of serving and guiding these leaders.

**Sponsoring club:** An active Kiwanis club willing to support and mentor the new club.

**Standard Form for Club Bylaws:** The governing document that is each club’s agreement with Kiwanis International regarding basic standards to belong to the organization and to use the Kiwanis names and marks.

**Traditions:** Common activities not required by the Standard Form for Club Bylaws that have been embraced by a club.

**Transferring member:** When a current member “transfers” their membership to a different club, they are exempt from paying the new member fee. For additional information, refer to Kiwanis International Policy 302.3.
Workbooks for club openers and club counselors