

CLUB LEADERSHIP EDUCATION

# President



A workbook for Kiwanis  
club presidents:  
updated 2019



**Kiwanis®**



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# Dear participant:

Thank you for being a leader — and for participating in Club Leadership Education. The information you receive during the session will help ensure your success as you begin your new role.

This workbook will be a crucial companion throughout the course. It's your guide to information and inspiration — from the exercises you'll complete to the forms and other information you'll encounter.

Take a little time to become familiar with this workbook. After all, a successful experience with Club Leadership Education is an important first step toward a successful experience as a club leader. Along with the Leadership Guide, you'll want to refer to this workbook throughout your year of service.





# Getting started

Your Kiwanis club elected you president because you have the quality of character to lead. As president, you'll ensure your club functions effectively. You'll lead your club in projects that benefit your community. You'll develop initiatives to increase club membership. Above all, you'll develop servant leaders who fulfill the Kiwanis mission at the club level and beyond.

Our objective is very simple: to help prepare you to manage the day-to-day operations of a Kiwanis club.

We will accomplish this by discussing the following topics:

- Job description specifics
- Administrative basics
- Additional information
- District information

How will we know if we've accomplished the goal? This takes time, but four measurable areas will serve as indicators:

- Improve the club experience as measured by member satisfaction surveys
- Stabilize or increase membership in your club
- Increase club participation at Kiwanis International and district events
- Support of a Service Leadership Program(s) or branded program(s)

← **Resource:** You'll find lots of helpful tips and info at [kiwanis.org](http://kiwanis.org). Bookmark it on your browser.

## NOTES

This image shows a full page of blank, lined paper. It features approximately 20 evenly spaced horizontal grey lines across its entire width, providing a guide for handwriting or typing. The paper itself is a clean, off-white color.

# Job description

## Responsibilities

As presiding officer of the club and the board, the president works closely with the board of directors and committee chairmen to establish and follow a strategic plan, set goals for improving the members' club experience and strengthen the club by adding new members.

## Qualifications

- Empowers and inspires members
- Manages time well
- Builds relationships with community leaders
- Facilitates club meetings
- Leads by example

**Tip:** Club presidents will find a list of resources at [kiwanis.org/clubpresident](http://kiwanis.org/clubpresident).

## Duties

- Establishes a strategic plan for the club, including goals for membership and community service
- Motivates members and committees to achieve those goals
- Organizes an effective leadership team by appointing and training effective committee chairmen
- Encourages club leaders to participate in the education course provided for their roles
- Supports committee activity to ensure a successful club experience
- Ensures that the club continues to be relevant to the community and to the members through periodic assessments
- Gains an understanding of sponsorship responsibilities to Service Leadership Programs
- Provides club members with Kiwanis Youth Protection Guidelines
- Helps ensure club meetings are fun, efficient and educational
- Leads effective and efficient board meetings
- Implements a succession plan for future leaders to ensure a seamless transition
- Communicates regularly with club members about club business and activities
- Rewards and recognizes member and committee achievements
- Fulfills all other duties documented in the Standard Form for Club Bylaws

# What do I do as Kiwanis Club president?

Your main purpose is to help create the best possible Kiwanis club experience for your fellow members. Everything in this workbook suggests ways to lead the best possible Kiwanis club experience in the following areas:

## SERVICE

- Assess your club's current projects. Determine whether they still meet your community's needs.
- Conduct a community survey (see page 27) to see what new needs exist in your community. Then get your club involved in meeting those needs. A community analysis is best conducted in mid to late summer.

## STRENGTH

- Conduct a member satisfaction survey (see page 32) to find out what matters to your club. This is best conducted mid to late summer.
- Plan a Saturday-morning retreat with club leadership to review results of the member satisfaction survey and the community survey in order to set three club improvement goals for the new fiscal year. A retreat is best conducted in late August/early September.
- Contact your Kiwanis district office for help from the district membership team.
- Ensure your club has members in attendance at the Kiwanis International convention and your district convention. Discuss what was learned at each during a club program.
- Make sure that the club board meets once a month to evaluate progress toward the goals. (See samples on page 39.)
- Have meaningful club meetings with an agenda. (See sample on page 23.)
- Conduct at least one concentrated membership drive campaign during the year. (See ideas on page 50.)
- Establish a New Member Orientation. (See page 54.) If your club already does this, seek members' input on possible improvements.
- Make sure that new members receive a meaningful induction. (See pages 56-57.)
- Use every possible opportunity to recognize club members and appreciate their efforts.



## FUN

- Plan a special event at least four times a year just for club members and their families. Invite a fellow member to coordinate. Ideas include: Local sports team games, dinner theatre, bus trips to nearby attractions, family picnics, holiday party at a member's home, bowling day, miniature golf day.
- Foster fellowship at meetings. Ideas include: Happy Dollars, Kiwanis Kwiz Trivia Question, Guess the Greeter, Two Truths & One Lie.

## COMMUNITY AWARENESS

- Invite a member to maintain and consistently update your club's website and Facebook page. (Or invite two members to split those duties.)
- Invite a member to produce and email a club newsletter on a consistent basis.
- Encourage members to deliver Kiwanis magazines to their doctors'/dentists' waiting rooms.
- Display shiny Kiwanis road signs at all community entrances (with permission).
- Display a "Kiwanis Meets Here" sign in your club's meeting location (with permission).
- Coordinate a press release to all local media for club service projects and fundraisers.
- Hold an annual "Media Appreciation Day."
- Order your free custom club logo at [kiwanis.org/customlogo](http://kiwanis.org/customlogo).

## KIWANIS FAMILY SPONSORSHIP

(Circle K, Key Club, Builders Club, Kiwanis Kids, Aktion Club)

- Make sure that a member of your club is actively working with each of your sponsored clubs.
- Volunteer your Kiwanis club to help the sponsored clubs on their service projects.
- Plan fun events with sponsored clubs.

## President's monthly checklist

### Before your term begins

#### **APRIL–JUNE**

- ☐ Announce date, time and location of club leadership education courses as soon as they become available.
- ☐ Schedule a summer planning meeting with Kiwanis club leadership, Kiwanis club advisor(s) of any Service Leadership Programs and the officers of the sponsored club.
- ☐ Seek advice from current officers for next year and help make the current year successful.
- ☐ Attend the Kiwanis International convention and make plans to attend your district convention.
- ☐ Mark your calendar with division council and club opening dates for the year.

#### **JULY**

- ☐ Select committee chairmen and special appointees. Meet with each to establish goals and expectations.
- ☐ Encourage each committee chair to complete a club committee chair education session.
- ☐ Work with the membership committee chair to develop a solid membership plan. Consult [kiwanis.org/theformula](http://kiwanis.org/theformula) for resources and guidance.
- ☐ Arrange a meeting with the current president. Seek advice on areas of improvement in the club. Ask about conducting a community survey and a club assessment to help develop goals for the upcoming year. Download the "Rediscovering your community" tool from [kiwanis.org/ACEtools](http://kiwanis.org/ACEtools).
- ☐ Attend the Kiwanis International convention and report to your club when you return.
- ☐ Finalize plans to attend the district convention as one of your club's three delegates.

#### **AUGUST**

- ☐ Complete a club president education session before September 30.
- ☐ Work closely with the incoming club secretary to ensure that he or she attends a club secretary education session before September 30.

- ☐ Provide the program committee chairman with a schedule of meeting dates and encourage him or her to develop a program assignment schedule for the calendar year.
- ☐ Finalize a membership plan with the membership committee.
- ☐ Schedule a budget planning session with the board and committee chairmen for late September. Approve the club budget before October 15 (preferably by October 1).
  - ☐ Consult with the club board to determine the need for director's and officer's liability insurance.
  - ☐ Consider what financial assistance will be given to delegates and alternates attending the Kiwanis International convention.
  - ☐ Consider what financial assistance will be given to delegates attending your district convention.
  - ☐ Consider a club donation to the Kiwanis Children's Fund.
- ☐ See that your club treasurer receives copies of pertinent information from the incoming secretary.
- ☐ Meet with the current and incoming treasurers. To review responsibilities and procedures.
- ☐ Accompany Key Club, Builders Club and K-Kids advisors to visit school principals to reinforce the sponsored club support for the coming year. Confirm sponsorship needs of Circle K clubs and Aktion clubs as well.

## SEPTEMBER

- ☐ Develop an agenda for the club president's planning conference. See pages 37-38 for more details. Conduct this session before September 30.
- ☐ Review Kiwanis International awards programs as well as any awards programs offered by your division or district. This information is in the reference materials section of this guide.
- ☐ Make plans for any joint service, social and/or fundraising activities for the year with your club's sponsored SLP clubs.
- ☐ Make plans for Kiwanis Family Month, which is in November.
- ☐ Make certain every officer, board member and committee chair is prepared to "hit the ground running" on October 1.
- ☐ Plan the club president's address, which will be at the first or second club meeting in October. See page 41 for more details.

- ☐ Report to your club about what you learned at your district convention.
- ☐ Extend invitation(s) to sponsored SLP club president(s) and faculty advisor(s) to attend the club officer installation event.
- ☐ Encourage representatives from your Key Club to attend Key Leader weekends.
- ☐ Raise awareness in your community by using the Kiwanis brand consistently. Make sure your membership committee follows the latest Kiwanis brand guide available at [kiwanis.org/awareness](http://kiwanis.org/awareness).

## During your term

### OCTOBER–SEPTEMBER

#### *For every board meeting:*

- ☐ Coordinate with the club secretary to prepare the meeting agenda.
- ☐ Review progress on each goal and project.
- ☐ Collect committee reports.

#### *For every club meeting:*

- ☐ Coordinate with the club secretary to prepare the meeting agenda.
- ☐ Confirm program/speaker (if applicable).
- ☐ Evaluate the past month's meetings and adjust as needed.
- ☐ Confirm new-member inductions for the meeting and have supplies ready.
- ☐ Begin and end the meeting on time.

### OCTOBER

- ☐ Before your first board meeting, review the minutes of the previous month's board meeting.
- ☐ Finalize this year's goals and budget at this board meeting. Send club goals to your lieutenant governor.
- ☐ Before your first club meeting, review a sample agenda, included in this guide.
- ☐ Announce and make preparations for the lieutenant governor's visit.
- ☐ Ask the membership committee to submit a news release about the installation of club officers to the local newspaper. Encourage the chair 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.
- ☐ Be the first to induct a new member. Challenge others to follow your example.

## NOVEMBER

- ☐ Make certain all club, division, district and Kiwanis International news, projects and events are communicated through newsletters and announcements. Make sure members learn something about Kiwanis each week.
- ☐ Observe Kiwanis Family Month. Designate weeks to recognize the Circle K, Key Club, Builders Club, Aktion Club and K-Kids clubs that your club sponsors.
- ☐ Take part in Giving Tuesday. For more information, check out [kiwanis.org/childrensfund](http://kiwanis.org/childrensfund).

## DECEMBER

- ☐ Make plans to interact with your club's SLP clubs through May of the upcoming calendar year.
- ☐ Encourage members to attend mid-year conferences.
- ☐ Continue to encourage club members to register for and attend the Kiwanis International convention.
- ☐ Check in with committee chairmen to talk about progress toward goals.

## JANUARY

- ☐ With the club secretary, 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 57-60 for more details.

## **FEBRUARY**

- ☐ Make sure your Circle K clubs and Key Clubs elect and report new officers to your district and the Kiwanis International Office.
- ☐ Appoint a nominating committee at least five weeks before the annual club meeting.
- ☐ Ensure your Key Clubs and Circle K clubs are represented at district conventions.
- ☐ Remind Key Clubs and Circle K clubs to attend their district education sessions.

## **MARCH**

- ☐ Ensure plans are completed for Kiwanis One Day.
- ☐ Review Kiwanis International award programs, as well as district, division and club award programs. Determine whether your club is on target. Look for additional opportunities at [kiwanis.org/recognition](http://kiwanis.org/recognition).
- ☐ Remind club members who plan to attend the Kiwanis International convention to submit their registration forms at [kiwanis.org/convention](http://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 clubs and Key Clubs you sponsor to attend their district conventions.

## **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.
- ☐ Help your SLP 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.
- ☐ Meet with your club's incoming president. Offer advice on areas of potential improvement in the club.
- ☐ Remind the incoming president to attend the Club Leadership Education session in your area. Contact the 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 clubs and Key Clubs are represented at their conventions.

**JUNE**

- ☐ Review Kiwanis International award programs, as well as district, division and club award programs. Determine whether your club is on target. Look for additional opportunities at [kiwanis.org/recognition](http://kiwanis.org/recognition).
- ☐ Involve your successor 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.
- ☐ Encourage representatives from your Key Club to attend Key Leader weekends.

**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.
- ☐ Remind the president-elect to accompany Builders Club, Key Club and K-Kids committee chairs to visit school principals to ensure sponsored programs plans are made for the coming school year.
- ☐ Remind the president-elect to set up a meeting with officials on the campuses of your sponsored Circle K clubs.
- ☐ Plan the installation ceremony, which is usually conducted in late September. Work with your secretary to ensure the merchandise order is submitted for items that honor incoming and outgoing officers and other club leaders and allow three to six weeks plus shipping time for items (officer pins, plaques, certificates, etc.) requiring personalization. Invite the incoming lieutenant governor to install incoming officers.

## AUGUST

- ☐ Help the incoming president plan for the upcoming year.

## SEPTEMBER

- ☐ Work with the secretary to order any awards earned by club members.
- ☐ Ask club members who attended the district convention to report to your club about the business that was conducted and their experiences.
- ☐ Conduct an installation ceremony.
- ☐ Encourage representatives from your Key Club to attend Key Leader weekends.
- ☐ Submit a club gift to the Kiwanis Children's Fund by September 30 — either online or postmarked by that date for appropriate recognition.

## OCTOBER

- ☐ Pass president's materials to incoming club president.

*Congratulations on your year of success! And remember, your district needs strong leaders. Consider becoming a lieutenant governor.*



# Your club's board of directors

## THE CLUB PRESIDENT'S ROLE

- Presides over board meetings
- Sets the board meeting agenda
- Calls special meetings of the board, if necessary
- Consults with the board to establish club goals that align with the club's strategic plan
- Serves as *ex-officio* member of all standing and special committees

## PURPOSE OF THE CLUB BOARD

Every Kiwanis club has a board of directors to ensure smooth club operations, to lead club initiatives, and to create and uphold the club's vision. Most of the board's tasks are related to administration, decision-making and strategic planning. They include:

- Determining the status of members in accordance with club policy.
- Setting an annual budget before October 15 each year.
- Ensuring compliance with applicable governmental rules and regulations.
- Overseeing the implementation of club policy.
- Ensuring that the club is meeting its financial obligations, including the annual review of financial statements by either a standing financial review committee or a qualified accounting firm. No board member may be part of the financial review committee.
- There might also be other duties assigned to the board in your club bylaws and policies.

## STRUCTURE OF THE CLUB BOARD

As stated in the Standard Form for Club Bylaws and Policies, the club board includes:

- Officers
  - President
  - President-elect
  - Immediate past president
  - Vice presidents (if any)
  - Treasurer
  - Secretary (or secretary-treasurer if the two positions are combined)
- Directors (non-officers members)

Other positions as may be required by the laws of local jurisdiction. Generally, this applies only to clubs in Europe and Asia-Pacific.

Board officers' terms vary, but all begin on October 1. Club officers serve one- or two-year terms, and directors serve one-, two- or three-year terms. However, if your club chooses to elect directors for two-year or three-year terms, stagger the terms so that only one-half or one-third of the directors are up for election each year.

## **BOARD MEETINGS**

The board meets regularly at a designated place and time. The board may also hold special meetings at the call of the president via a majority vote of the board — provided at least 48 hours notice is given to all board members of the date, time, place and topic.

The board may meet and conduct business by any method that allows all participants to communicate with each other simultaneously. This may include online technology such as GoToMeeting or Skype, conference calls or email. Participation in the conversation, however it takes place, constitutes attendance. A record of attendance is important to determine that a quorum was present if any action was taken. (For a club board meeting, a quorum is defined as more than half of the board members.)

Kiwanis uses "Robert's Rules of Order" as guidelines for conducting a board meeting. If any verbal votes are unclear, hold a roll call to capture each vote.

The board may take no action that conflicts with the best interests of the club and its members. Other than disciplinary measures, an action of the board may be rescinded or amended by two-thirds vote of the club members present and voting, provided at least 14 days notice is given to all club members.

# Board of directors meeting

To ensure order and efficiency, an agenda is crucial for any board meeting. Here are two suggested formats. Of course, you can choose to create your own.

## **SAMPLE FORMAT: OPTION 1**

Roll call confirming quorum is present

### **Secretary's report**

- Minutes from previous meeting (board to vote on approval after review)
- Official correspondence

### **Treasurer's report** *(board vote on approval after review)*

- Administrative and service accounts
- Approval for payments not within the approved annual budget

### **Membership committee report**

- Applications for membership
- Resignations or changes in club roster

### **Other reports and club matters**

- Unfinished business from a previous board meeting
- New business
- Strategic discussion about areas of concern
- Division business
- District business
- Kiwanis International business

## **SAMPLE FORMAT: OPTION 2**

Confirm quorum is present

### **Consent agenda**

Non-controversial items that require board action but not discussion or debate. If any board member wants to discuss something on the consent agenda, he or she asks for it to be moved to the action agenda. After any requested items are moved from consent to action, the consent agenda is voted on as a whole:

- Secretary's report and minutes
- Treasurer's report

### **Action agenda**

Items expected to require normal discussion and deliberation. Each item is discussed and voted on individually:

- Committee reports that require action
- Funding requests outside of the approved budget

### **Information agenda**

Items and committee reports that are provided to inform board members but do not require action. Board members may request topics be moved from the information agenda to the action agenda

### **Future business**

# Club meetings

## THE BEST SHOW IN TOWN

As president, you set the tone for your club. These guidelines can help. You don't need to do every task yourself, but it's important to make sure everything's covered.

- Designate specific people to greet members as they arrive.
- Put out flags, banner, bell, gavel, name badges, lectern and guest badges.
- Check audiovisual aids before the meeting.
- Seat visiting Kiwanis leaders (governor, lieutenant governor, etc.) in a prominent location, if applicable, and recognize them once during the meeting; they don't need to be recognized by each program participant. If your club has invited the governor or lieutenant governor, assume all expenses with the exception of transportation.
- Make complementary meal arrangements for guests in advance if applicable.
- Traditionally, members rise and applaud when their lieutenant governor or governor, a member of the Kiwanis International board, a past president of Kiwanis International or other distinguished Kiwanian is introduced. Let a few club members know this in advance so they can set the stage for the club.
- When both the district governor and the host lieutenant governor are at a club meeting, you'll introduce the lieutenant governor — who, in turn, introduces the governor.
- Introduce inter club delegations, visiting Kiwanians, potential members, representatives of Service Leadership Programs and other guests.
- Develop a standard timed agenda, designate who will have the floor for each action, brief all participants on their roles and begin and end the meeting on time. (See sample agenda on page 23.)
- At every meeting, recognize the achievements of members and committees — and express thanks on behalf of the club.

## COURTESIES TO SPEAKERS

This checklist will make it easy for you or a member in charge of speaker visits to welcome and introduce your guests.

- ☐ Inform a speaker of:
  - ☐ The date, time and place of the meeting
  - ☐ Any requests for speech content before or after the meeting
  - ☐ The approximate size of the audience
  - ☐ The meeting agenda, time allotted for the speech and adjournment time
  - ☐ Equipment available to the speaker (projector and screen, lectern, etc.)
- ☐ Request the spelling and pronunciation of the speaker's name, a resumé for publicity and an introduction.
- ☐ Ask a member to greet the speaker and introduce him or her to you and other members. Make sure the speaker is given a guest or speaker's badge and seated at the head table. Have a cup or bottle of water at his or her place (or the podium).
- ☐ Before the presentation, offer a brief, formal introduction of the speaker. Offer an inexpensive token of appreciation. Consider making a donation on his or her behalf to a cause that reflects the club's focus on service and community.
- ☐ Many clubs make it a practice to rise and applaud when the speaker is introduced or at the conclusion of the presentation. If you'd like to introduce this practice to your club, present the idea to club members at an appropriate time.
- ☐ A day or two after the speaker's visit, send a note of appreciation from the club.

## SAMPLE AGENDA

	PERSON RESPONSIBLE	START TIME	END TIME
<b>Opening activity</b>	_____	_____	_____
<i>(This may include a song, an inspirational thought or a simple welcome.)</i>			
<b>Introductions</b>	_____	_____	_____
<i>(Visiting district and division officers, new members, inter clubs, other guests)</i>			
<b>Communications received</b>	_____	_____	_____
<b>Announcements</b>			
• Board actions	_____	_____	_____
• Projects	_____	_____	_____
• Meetings	_____	_____	_____
<b>Committee chairmen reports</b>	_____	_____	_____
<b>Recognition of members</b>			
• Induction ceremony	_____	_____	_____
• Awards received	_____	_____	_____
• Newspaper publicity	_____	_____	_____
• Birthdays	_____	_____	_____
• Anniversaries	_____	_____	_____
• Club achievements	_____	_____	_____
• Extend greetings and thanks to visitors for attending	_____	_____	_____
<b>Presentations</b>			
• Certificates and other awards	_____	_____	_____
• One-minute education spot	_____	_____	_____
<b>Program</b>			
• Introduction	_____	_____	_____
• Program	_____	_____	_____
• Thanks	_____	_____	_____
• Extend appreciation to visitors for attending	_____	_____	_____
<b>Adjournment</b>	_____	_____	_____

## Club committees and their leadership

Club committees plan fundraising events, invite and educate new members, and develop service projects. That's why you should be thoughtful about who you put in committee leadership roles: Committee chairs play a key role in connecting new and seasoned members to the work your club does in your community and beyond. Together you and your committee chairs will establish goals for the year. You'll give them guidance, share general expectations and schedule regular checkpoints. Consider the following duties as you determine the best fit to lead each committee.

### GENERAL DUTIES OF COMMITTEE CHAIRS

#### Task list before their year of service

- ☐ Attend club committee chair education.
- ☐ Become familiar with your club's bylaws and policies and procedures.
- ☐ Schedule an organizational meeting in August.
- ☐ Select the members of the committee.
- ☐ Create subcommittees if needed.
- ☐ Develop a committee budget. (Get board approval if necessary).
- ☐ Develop a communications plan for the year.
- ☐ Determine whether the current committee has unfinished goals or commitments the incoming committee is expected to complete.
- ☐ Review and establish long-range and annual goals with the incoming president.
- ☐ Develop an action plan based on goals.

#### Task list ongoing

- ☐ Plan and conduct regular committee meetings and activities.
- ☐ Manage the committee's budget.
- ☐ Work with other committees in the club.
- ☐ Monitor progress toward committee goals.
- ☐ Write and submit monthly reports to the club president and secretary.
- ☐ Attend club board meetings and report on committee plans and achievements.



Starting with these lists, meet with each committee leader to discuss and determine specific goals, responsibilities and timelines. Together, consider these questions:

- What's the role of a committee chair?
- Is there a written job description?
- What details are included in the club bylaws or policies and procedures?
- What are the committee's long-range and annual goals?
- What resources are available for committee leaders?

Also encourage your chairs to attend club leadership education for committee chairs at your district convention or online at [kiwanis.org/leadertools](http://kiwanis.org/leadertools).

## YOUR CLUB'S COMMITTEES

Each club has a list of standing committees within its bylaws. Many clubs have added committees for different functions, such as support for specific fundraisers and service activities.

Your standing committees likely include:

### Financial review\*

#### 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

*\*The only committee required by the Kiwanis International Standard Form for Club Bylaws is an annual financial review committee, unless the club hires a qualified accounting firm to conduct its annual financial examination. Refer to page 63 for details.*

These topics can be divided into separate committees or even subcommittees, depending on club preference.

What other special committees does your club have?

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Will any of these special committees have completed their task by the end of the current year? Will any committees be added during your year as president?

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**TIMELINE**

**By July 15**, appoint all committee chairmen.

**By August 1**, chairmen will select members for each committee.

**During August**, committees will meet to review materials, goals and timelines. They'll form project schedules and submit a budget proposal for board consideration before the **end of September**.

If a community analysis is part of your plan, schedule the service and fundraising committee to conduct and complete it by **October 1**. Consider using the "Rediscovering your community" tool to help with this process. It's available at [kiwanis.org/ACEtools](http://kiwanis.org/ACEtools) and on page 27.

## ACHIEVING CLUB EXCELLENCE

# REDISCOVERING YOUR COMMUNITY

**Tip:** Among the resources available to club leaders, Achieving Club Excellence tools are some of the most useful. We're including a few of the most relevant to your position here. But you can find the full workbook at [kiwanis.org/ACEtools](http://kiwanis.org/ACEtools).

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

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.

This step-by-step tool will lead you through the survey process. Along the way, it will 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 its membership 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 and members of other groups with which the club has a relationship
- Community leaders
- Government officials
- Public safety officials
- School administrators
- Service Leadership Programs' faculty advisors
- 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)



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## REDISCOVERING YOUR COMMUNITY

### STEP 2: IDENTIFY TEAM MEMBERS

Choose a partner or put together small teams. Working in pairs or teams can make the interview more comfortable, and ensure detailed notes are taken.

### 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. Interviews can take place by email, over the phone or in person. When it's over, ask for contact information so you can follow up (and offer your own).

If the interview is face-to-face, ensure you have the most updated Kiwanis International application and information. 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.

Whatever interview format you choose, be prepared. Anticipate how it should go, and keep it focused. Capture 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 community needs that we don't know about. To do this, we are trying to gather opinions about the good in our community, as well as how it could be improved. Would you have a few 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 should concern us most?
- Which organizations or groups 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 have you been in the last three years?
- How do you see yourself getting more involved in improving the community?
- What are the greatest barriers to community involvement for you personally (if applicable) or for community members?
- What would get people excited about volunteering in the community?



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## REDISCOVERING YOUR COMMUNITY

- Who are the most respected and influential people in our community?
- Who else should we talk to about how we can 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 any need 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:

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Media and marketing ideas:

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Fundraising ideas:

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Other people and/or organizations to contact:

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## STEP 4: DEBRIEF AND REFLECT

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 new members at a membership committee meeting. Questions to keep in mind:

Was any information obtained suggesting need(s) for club action?

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## REDISCOVERING YOUR COMMUNITY

Did members hear any of the same community needs?

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Which seemed to be the top priority?

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Does the club have the interest and financial means to pursue new projects? (Take a look at **Analyzing your impact** for ideas on weighing the costs and benefits of potential and current projects.)

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

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How might the club help resolve frequently noted community concerns?

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Is there an upcoming service project to which you can invite individuals?

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What people or organizations could you create relationships with? (Look at **Developing community partnerships** for more ideas about sponsorships and partnerships.)

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If some issues warrant further discussion between community leaders and organizations, consider hosting a community forum with a cross-section of influencers. Develop open-ended questions about the areas of concern. For example: "How can we engage our children in community improvement?" or "What do you believe is the top issue concerning our youth?"



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**REDISCOVERING YOUR COMMUNITY****DREAM BIG!**

Based on the needs and the ideas you've generated, think about these questions:

- 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 make your new service project happen by this time next year? Take a look at the **Signature Project Toolkit** to help determine your next move.

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GIGR-1117-599

# MEASURING MEMBER SATISFACTION

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

The member experience is an important factor in the health and strength of a club. Members want to love every aspect of their club. They want to feel satisfied with the value they get for their time, talent and money. This tool will help you gain member feedback and use it to make improvements. Begin the conversation using one of these options:

- **Interview members individually.** This method works well when group trust is strong and members feel comfortable speaking candidly. You might ask: What drives them to serve? How do they feel about being part of the club? What do they think of the meetings and service opportunities? What type of impact should the club have in the community?
- **Offer an anonymous survey.** Adapt the survey on the next page to get a general picture of members' opinions on topics ranging from club administration to service impact. Include opportunities to provide feedback. You can distribute the survey as a printed copy or collect electronic responses through an online survey provider.
- **Conduct an open forum.** With an unbiased facilitator, this method can inspire more interactive discussion. But remember the possibility that not all members will feel comfortable. Prompt members with open-ended questions similar to those in the survey on the following page.
- **Conduct a visual assessment.** Tape sheets of paper to a wall, with categories such as club administration, service impact, membership strength and member experience. Invite members to place sticky notes beneath them, with comments about things they enjoy and things they want to change. Then read each comment aloud and discuss how it can be incorporated into the club's activities.



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## MEASURING MEMBER SATISFACTION

### MEMBER SATISFACTION SURVEY

This survey will help club leaders evaluate how effectively the club is meeting members' expectations. 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?

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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?

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## MEASURING MEMBER SATISFACTION

### 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 want to participate.
- \_\_\_\_\_ Our club is an important advocate for children in our community.

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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## MEASURING MEMBER SATISFACTION

### 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

You can develop and refine club goals by identifying what your club needs to start, continue and stop doing during the coming year. Average out the results of your surveys. Then share the findings with your members via email – or take time to present them at a meeting.

#### Is the club score 99 or more?

Congratulations! Celebrate your success and think about how it can inspire 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 98?

Good work! Build on the momentum of your club's 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 each area with answers averaging 0, 1 or 2. Brainstorm about how to implement change.

#### Is the club score less than 74?

Thank you for your honesty. The first step toward change is acknowledging that it's necessary. Where do you start? Discuss how to make the club experience more meaningful – before you invite more people to join.



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## MEASURING MEMBER SATISFACTION

### SEARCH FOR SOLUTIONS

Whatever your club's results, you have resources that can help you make improvements:

- **Club management/administration.** Visit [kiwanis.org/leadertools](https://kiwanis.org/leadertools) for resources that will help club officers make the club stronger and more service-oriented.
- **Membership strength.** Visit [kiwanis.org/membership](https://kiwanis.org/membership) for resources that will help you invite new members and improve your club.
- **Community impact.** Here are a few ways to increase your hometown presence:
  - o Take a look at the tool called **Analyzing your impact**. It will help you think about how to improve service and fundraising.
  - o Explore issues of Kiwanis magazine. Browse service project ideas at [kiwanismagazine.org](https://kiwanismagazine.org).
  - o Talk to people in your community. Check out the **Rediscovering your community** tool. Interviews can help the club understand community needs – and how community leaders believe Kiwanis can help. This may also uncover opportunities for new partnerships or sponsorships – so check out the **Developing community partnerships** tool.
- **Member experience.** How often do you thank or recognize members? Discover more ways to celebrate good work with the **Celebrating success** tool.



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# Club president's planning conference

To help ensure an efficient and effective year as club president, you want to hit the ground running. That's why many incoming presidents conduct a planning conference with other club leaders. The following information will help you create a conference that gets you and your club ready for the coming year.

Most of all, remember: **Complete your club president planning conference no later than September 30.**

## PURPOSE OF THE CONFERENCE

- To review the club organization and the specific responsibilities of each elected and appointed leadership position in the club
- To review and finalize the goals, actions and timelines for overall club improvement and each committee and special appointment
- To review Kiwanis International, district and division goals for the club and incorporate these into the club's goals
- To review the preliminary budget (income and expenses) for the club to accomplish its goals (The board of directors approves final budget by October 1, or no later than October 15.)
- To present a calendar of upcoming club, division, district and Kiwanis International events

## PRE-CONFERENCE PREPARATION: MEETINGS

- **Individual club leader discussions (June–August).** With each elected and appointed club leader use this guide to help establish a clear understanding of responsibilities and agree to a set of goals and timelines.
- **Club Leadership Education (August–September).** Before your term begins, encourage board members and committee chairmen to participate in education for their specific position online, at your district convention or during a designated training session.
- **Committee organizational meetings (August).** Ensure club committees develop goals into preliminary plans of action and prepare a net operating budget. Each committee chair will bring his or her meeting results and present goals, timelines and proposed budgets.
- **District convention (April–September) and Kiwanis International convention (June/July).** Attend as a club delegate. Workshops during these conventions provide a wealth of information regarding service, membership and club operations.

## **PRE-CONFERENCE PREPARATION: TASKS**

- Gather Kiwanis International, district and division goals for presentation.
- Ask the incoming club secretary to bring:
  - Calendar of official due dates for reports and forms
  - Schedule of Kiwanis International, district, division and club activities and events.
  - A copy of the club bylaws
  - Current information about the Distinguished Criteria
- Ask the incoming treasurer to bring the preliminary budget.

# Goal setting

## SMART GOALS

Work SMART. Set goals that are:

**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 OK to be optimistic. As the committee develops strategies to achieve your goals, you'll be amazed what you can do.

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

### Here's a good example of a SMART goal:

*Increase the number of service hours provided to the community by 10 percent by September 30 of next year.*

**Specific:** 10 percent increase

**Measurable:** Service hours on October 1 compared to service hours next September 30

**Action-oriented:** Identify the action steps needed to complete each goal. (Select a service chair, organize service projects, encourage all members to participate in the service activities, and recruit more members to contribute to more service.)

**Realistic:** A 10-percent increase in service hours is attainable and plausible for club members.

**Time-bound:** Completion date is set

What is a SMART goal you would like to achieve?

Specific:

Measurable:

Action-oriented:

Realistic:

Time-bound:

**Tip:** Best practices tell us to focus on no more than three goals.



## Club president's address

*(previously known as club president's conference)*

During the first or second regular club meeting in October, the new president should address the club to introduce new club leadership and to share major goals, the annual budget and a schedule of events for the upcoming year.

### TASKS AND TOPICS

- Thank the immediate past president and the outgoing leadership team.
- Introduce and show appreciation to the incoming club leadership team:
  - Officers
  - Board of directors
  - Committee chairmen
  - Special appointments
- Announce the club's major goals and objectives for the year, including what is needed and expected of members.
- Announce the goals for Kiwanis International and the district for the year.
- Have the secretary present the secretary's report.
- Distribute the club roster.
- Distribute and review club bylaws.
- Distribute the club calendar.
- Distribute and review Kiwanis Youth Protection Guidelines. Include the webpage address: [kiwanis.org/youthprotection](http://kiwanis.org/youthprotection).
- Have the treasurer present the annual budget.
- Have committee chairmen and others announce upcoming events or special plans.

# Installation of club board members and officers

This worksheet is designed to help you assign tasks for this ceremony, which should be conducted at the end of September or the beginning of October. While the club president is responsible for the installation of club board members and officers, it's common for a guest of honor — such as the lieutenant governor — to preside.

	PERSON RESPONSIBLE
<b>PRELIMINARY ORGANIZATION</b>	
• Plan the budget.	<hr/>
• Arrange the date with your lieutenant governor.	<hr/>
• Select and contract the site.	<hr/>
• Arrange the meal and the entertainment.	<hr/>
• Order the pins and awards.	<hr/>
<b>PARTICIPANTS</b>	
• Prepare the list of honored guests.	<hr/>
• Prepare the list of outgoing and incoming officers and directors with a pronunciation guide for the installing officer.	<hr/>
• Invite spouses and other special guests, including presidents and faculty advisor(s) of CKI, Key Club, Builders Club, Kiwanis Kids or Aktion Club.	<hr/>
• Confirm attendance and make reservations for expected attendees.	<hr/>
<b>PROGRAMS</b>	
• Design the program.	<hr/>
• Determine the quantity and place your order.	<hr/>
• Take the programs to your event site.	<hr/>
• Distribute the programs.	<hr/>

## **SAMPLE AGENDA**

### **Opening activity**

### **Welcome**

### **Introduction of head table or distinguished guest seating**

### **Introduction of other guests**

### **Introduction of entertainment**

### **Special presentations**

- Recognition of outgoing directors and officers
- Recognition of immediate past president
- Achievement awards and recognition

### **Installation**

Suggested order of installations:

- New directors
- Vice president(s)
- Treasurer
- Secretary
- President-elect
- Immediate past president
- President

### **Acknowledgments**

### **Closing**

### **Adjournment**

## SUGGESTED SCRIPTS

To recognize outgoing directors and officers who will not hold another office in the new year, the installing officer asks those members to stand. The installing officer thanks each outgoing leader for his or her contributions in the past year. Finally, the installing officer asks the membership to recognize the leaders with applause.

Now it's time to introduce the new officers. Here are suggested scripts for each position. If the installing officer is not a district officer or other nonmember of the club, replace "your" with "our" in the scripts.

**NOTE:** On some occasions, time will not permit more than a very brief installation ceremony. In such cases, modify the program to fit your situation.

### Directors

*Ask the new directors to come forward as their names are announced.*

"The board of directors of a club is composed of you, the elected directors and the officers. The board of directors handles most of the business of the club — an important responsibility. You'll set strategic direction, implement club policies, approve the club's budget, support committee activities and oversee the administrative tasks of the club. I know you will accept these responsibilities with a desire to see that this club has the best year ever. Thank you for stepping up to play this important role. It's my pleasure to formally install each of you as a director of this club."

### Secretary

*Ask the new secretary to come forward as his/her name is announced.*

"In Kiwanis, the club secretary is the master of details. Your role in handling club affairs — the details of the club and board meetings, the reports, correspondence and records — is essential for the club to run smoothly. Thank you for taking on this important role. I formally install you as secretary of this club."

**Treasurer**

*Ask the new treasurer to come forward as his/her name is announced.*

"As treasurer, you have been elected to an office that demands absolute integrity and financial and accounting skills. It is your role to deposit and disperse the funds of the club upon the direction of the board of directors. You'll also report on the club's finances at each board meeting. Thank you for stepping into this significant role. I formally install you as treasurer of this club."

**Vice president**

*Ask the vice president to come forward as his/her name is announced.*

"As an officer of the club, you contribute your vision and ideas to your club's leadership team. In the absence of the president, you shall preside at club meetings and board of directors meetings. I formally install you as vice president of this club."

*If the club has more than one vice president, these remarks must be adjusted accordingly.*

**President-elect**

*Ask the president-elect to come forward as his/her name is announced.*

"You have been selected to lead your club during the following year. As you serve on the board this year, take advantage of opportunities to learn about the president's role, build relationships and plan for your year as president. Thank you for your leadership and dedication. I hereby formally install you as president-elect of this club."

## **Immediate past president**

*Ask the immediate past president to come forward as his/her name is announced.*

"Your club benefits from the immediate past president continuing for one more year as a member of the board of directors. Your experience as club president this past year will empower you to be an essential mentor and colleague for your successor and a valued advisor on the business of the club. It's my pleasure to present to you your past president's pin, and by so doing, to charge you with sharing your wisdom and lending a hand as you remain a member of the board for one more year. Congratulations to you on your excellent work and dedicated service this past year. We thank you for your continued dedication to your club."

## **President**

*Ask the president to come forward as his/her name is announced.*

"You have been elected to the highest office your club can bestow upon you. It is an office of great honor — and great responsibilities. The success of your club in this new year will depend upon your leadership at club and board meetings and as you counsel and inspire your club's committees. In our community, you'll be the face of Kiwanis and your club. Guided by your club's vision, you and your board will set goals for improving your members' club experience and increasing the impact of your club's service in the community. Thank you for dedicating yourself to this leadership position. I hereby formally install you as president of this club, and I sincerely hope that your administrative year will exceed your expectations."

## **Conclusion**

"I congratulate your club on the excellent new directors and officers, and wish for them and your club a most successful year. Thanks to each and every one of you for stepping into your leadership roles. And thanks to the club members for your support of these leaders. I can assure you of the complete cooperation and assistance of the division, district and Kiwanis International officers and committee chairmen."

## Succession planning

**It's important to the ongoing success of your club to develop your club's leadership pipeline. Establishing a leadership pipeline ensures that the club's vision, plan, organizational structure, relationships and most importantly knowledge are carried on with minimal disruption.**

Take a minute to write down the names of any current members you see as part of your leadership pipeline.

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### KEY POINTS OF SUCCESSION PLANNING

**1. Apply the apprentice leadership method.**

This style involves teaching a new leader the role through supported practice. The predecessor gives the successor the expectations of the position, the tools for success and mentoring in the early days of the transition.

**2. Identify leaders or "doers" in your club.**

Constantly look for the right people in your club to assume leadership positions in the future. Begin engaging them in club activities and offer them opportunities to develop their leadership skills.

**3. Recognize your leaders.**

This recognition should be timely, appropriate and immediate in order to encourage other members to consider leadership positions.

[illegible]



# Club membership

Club presidents have a substantial impact on the club's membership retention and growth. It begins at club meetings:

- Recognize new members and their sponsors.
- Praise the membership chair and committee.
- Praise others for their leadership and praise the secretary for processing new members promptly.

Membership growth and retention also require ideas and action beyond the club meeting. For example, the club president and membership chairperson might initiate a club membership campaign by quarter, enlisting the lieutenant governor to recognize those who win the quarterly campaigns during visits, in the district magazine or on the district website. Consider a prize of some kind for those who have the best record for the period.

## OTHER IDEAS AND RESOURCES

Division council meetings offer a great place for clubs to learn what others are doing to focus on membership. See "Successful Membership Campaigns" on page 51 as a guide. This is a good time to offer the assistance of the club coaches of the district membership team. Look for members who would make good membership committee participants. Explain this position and its value to Kiwanis.

The "Membership Committee" booklet published by Kiwanis as a part of Club Leadership Education is a terrific workbook and guide for your membership committee. It's available from Kiwanis, and club leadership training is available online and at district events.

## Club membership growth tips

### **START WITH A REVIEW**

It is vital to make sure your club is both inviting and rewarding to new members soon after joining. To get an idea of what the club might look like to a new member, use the “measuring member satisfaction” tool on page 32 and find the “analyzing your impact” tool at [kiwanis.org/ACEtools](http://kiwanis.org/ACEtools).

### **PLAN A MEMBERSHIP DRIVE**

Make recruitment an ongoing emphasis for club members. As president, your focus and enthusiasm will be crucial. Make sure the club board and membership “buy into” the member drive.

### **FORM A TEAM**

Within the club, appoint a membership chair and a membership team. Ask club members who are positive and have good people skills.

### **MAKE A PROSPECT LIST**

Include neighbors, friends, acquaintances, professionals (lawyers, accountants, doctors, dentists, bankers, etc.) — anyone interested in kids and the community.

### **GUEST EVENTS**

Some clubs invite member prospects to a “guest event” with a feature that entices people to attend. At the event, members should match up with guests so that prospective members don’t end up huddled together.

### **MEMBERSHIP CAMPAIGNS**

Other clubs take the Prospect List they have compiled, split into teams of two, and go talk to those prospects face-to-face! You can see a lot of people if you’re organized. Often, this effort is made into a competitive contest — with rewards or prizes for the members or teams who bring in the most new members.

## BEFORE TALKING TO PROSPECTS

Practice your Kiwanis Story. Make sure it's upbeat and positive. Find out what interests your prospective member and tailor your conversation to those interests. Communicate the best reasons for joining Kiwanis, emphasizing your club's most meaningful projects.

And remember, help is available throughout a club's campaign or drive — or at any time:

- Your District Membership team has members who are club coaches trained in membership programs for existing clubs.
- Lieutenant governors or your district's membership coordinator can help clubs contact local club coaches!
- There are many helpful tools for club strengthening available online.

## SUCCESSFUL CLUB MEMBERSHIP CAMPAIGNS

### Kiwanis bucks

Make a "play" \$100 bill with the governor's picture on it and a \$50 bill with the club president's likeness on it. Use your imagination and change the bills as you wish! Member can earn Kiwanis Bucks by recruiting members and/or donating an item for a club auction. For a donation of an item worth more than \$50, the donor receives \$100 in K-Bucks; a donation of \$50 or less is worth \$50 in K-Bucks. At the auction, members can only bid with K-Bucks. The auction could be a social at the end of the campaign (perhaps the Kiwanis year), with guests (perhaps the lieutenant governor). Items that have been donated are bid on with K-Bucks. This event has worked at the club or division level successfully.

### Steak and beans challenge

Divide the club into two teams. Those who bring in a member will get steak at a meeting — and those who don't will get beans. At the end of the competition, the new members will join the winners for steak, and even sit in a special place while the others get the regular meal. If this works for your meeting format and location, it can be a very fun competition — and it's something to talk about each week during the month.

## **Gift cards**

Every member who recruits a new member receives a \$25 gift card. Various types of gift cards are assembled and the successful member can choose the card he/she wants. The cards are presented at club meetings so everyone will be motivated to bring in a new member.

## **Pick a card**

Each member who recruits new members gets to draw one card from a deck. At the end of the campaign or the Kiwanis year, whoever has the best poker hand out of their five best cards receives a \$100 gift card. The second best hand receives a \$50 gift card, and the third best hand receives a \$25 gift card. Cards are tracked and posted at club meetings so attention is brought to the program and members stay engaged. Gift cards can be presented at new member installation meeting(s) or annually at officer installation.

## **Desserts**

Anytime a new member is brought into the club, the sponsoring member and the new member receive a special dessert — perhaps served by the club president or membership chairperson.

## **600 pound gorilla**

Get a stuffed animal and draw a member's name out of a hat. If that member hasn't brought in a new member or a guest, he or she has to keep the gorilla and bring it to each meeting...until he or she gets the "monkey off their back." Once the gorilla is returned, another drawing motivates another member to help grow the club's membership.

## **Special speakers**

Have a congressman, mayor, local sports coach or other attention-getting figure speak at one or more meetings. In other words, someone a prospective member would really want to hear. Once you've got people there, have your club's best public speaker talk about joining the club, giving an overview of the impact the club has had in the community.

**Baseball team**

Have a one- or two-month competition in which club members are split into teams with familiar baseball-team names. Club members can even wear hats or shirts with team names for their particular team. Whichever team recruits the most new members during the contest receives a team prize, such as special food and recognition at the club meeting. Each team captain or a representative should say a few words at each meeting to build enthusiasm and let the competitive juices flow!

**Key club parent social**

Invite parents of Key Clubbers (and/or members of other Service Leadership Programs) that your club sponsors to talk about what the SLP has done for them. Have a proficient speaker from your Kiwanis club follow up with a closing message about joining Kiwanis — and how they can help bring the same opportunities to others that the speaker from the sponsored club has gotten.

**Convention contracts**

Have district convention attendees sign a "contract" to recruit a member between the convention and the end of the current Kiwanis year. For signing this pledge, they receive a special prize.

## New members

New members need to feel valued and appreciated from day one.

Within the first two weeks (if at all possible), complete a new-member orientation. This is an opportunity to provide your new members with a better understanding of your Kiwanis club. And it's a way for your club to learn about their interests and skills.

An orientation PowerPoint is available as a downloadable resource that includes a suggested script and ways to personalize it to reflect your club information.

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
  - The Kiwanis Children's Fund
  - District and Kiwanis International conventions
- Standard club operations:
  - Club bylaws
  - How club business is handled (e.g., what members vote on, how elections are handled)
  - The function of the club's board of directors
  - Finance and budget (including what dues cover)

**Resource:**  
Find the new-member orientation program at [kiwanis.org/orientation](https://www.kiwanis.org/orientation).

## MENTORING

By pairing new members with mentors, you're giving them a go-to person for any questions and a familiar face to sit with at meetings until they feel comfortable. Their mentors may be their sponsors or someone they just met. Mentors can help new members transition into the club by finding ways to connect their interests with club activities.

Which members might be great mentors?

[illegible]

**Resource:** For more ways to get members involved, go to [kiwanis.org/membership](https://www.kiwanis.org/membership) and look under the Sustaining Clubs section for retaining members.

## THE INDUCTION CEREMONY

The induction of new members is a memorable experience that helps them feel like they're a part of something important — your club. When you invest in their induction, you let new members know they're valued and appreciated.

Some clubs have a formal — or maybe even unique — tradition for welcoming new members. However you do it, make sure it happens. And make sure that it's timely and reflects your club's style and spirit.

### IDEA 1: OPEN WITH THE KIWANIS OBJECTS

As a way to reaffirm everyone's commitment to the ideals of the club, read the six Objects of Kiwanis. These Objects have been unchanged since 1924, and every member who has joined since then has agreed to these common principles.

#### 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 good will.



**IDEA 2: STICK TO A SCRIPT**

Here's a suggested format for clubs that prefer a formal script. Adapt it to fit your club's needs.

**PRESIDENT:**

Kiwanians care about their community. They join clubs to connect with other servant leaders, to multiply their impact and to make the community better. They give their time and talents to enrich the lives of children.

Today we're pleased to welcome \_\_\_\_\_ (new member) to our club. He/she is sponsored by \_\_\_\_\_ (sponsoring Kiwanian). \_\_\_\_\_ (sponsor), would you please introduce us to \_\_\_\_\_ (new member)?

**SPONSOR:**

Thank you. I take great pride in presenting our newest member, \_\_\_\_\_ (new member).

*[Share information that the new member is comfortable sharing]*

I'm honored to share the benefits of belonging to Kiwanis: meaningful service, great friendships, and lots of fun with \_\_\_\_\_ (new member). I know you will receive great satisfaction from serving others. On behalf of our club, I'd like to say thank you — for caring about our community and for joining Kiwanis to make it better. Thank you for offering your time and talents to improve the lives of children.

**PRESIDENT:**

\_\_\_\_\_ (New member), you join an organization that has served children for more than 100 years — and will serve even more children in its second century. Are you ready to join us? *[Wait for response]*

### **IDEA 3: OPEN WITH KIWANIS KEY MESSAGES**

- Kiwanis focuses on serving children around the world so that future generations will thrive.
- Kiwanis unifies generations with opportunities to make transformational differences that leave a legacy for communities around the world.
- Kiwanis values the enthusiasm of members to pursue creative ways to serve the needs of children in their communities.
- Kiwanis is a global community of clubs, members and partners dedicated to improving the lives of children.

# Annual club meeting

*(election of officers)*

## GUIDELINES

From Standard Form for Club Bylaws, Article 3.3 and Policy E, [kiwanis.org/newclubbylaws](http://kiwanis.org/newclubbylaws)

## PURPOSE

To elect officers and directors and hear annual reports from the club president, secretary and treasurer

## TIME FRAME

Hold your annual club meeting during a regular club meeting between January 1 and May 15. Be sure to announce the date at least 30 days in advance.

**5 weeks in advance:** The president appoints a nominating committee to make nominations and prepare a ballot to elect officers and directors.

**2 weeks in advance:** The nominating committee submits a list of nominees. For officers, that means no more than two nominees for each office. For directors, that means no more than the number of director positions to be filled plus three candidates. The president-elect is the sole candidate for president nominated by the committee.

**1 week in advance:** Nominations from the floor may be made for any position to be filled.

**At the election meeting:** Volunteers will be appointed to prepare the ballot, count votes and certify results. (Additional nominations from the floor may be made at this meeting, if desired.)

## HOW NOMINATIONS ARE MADE

For nominations, follow the order listed in Article 4.1:

- President
- Immediate past president
- President-elect
- Treasurer
- Secretary
- Vice president(s)
- Directors

Here's some sample language for nominations from different audiences.

### By the nominating committee

President: "We will have the report of the nominating committee."

Chair of the nominating committee: "The nominating committee submits the following nominations: For president, Bob Adams; for immediate past president..." (etc., for each office to be filled).

### From the floor

President: "For president, Bob Adams is nominated by the nominating committee. Are there any further nominations for president?"

Member: "I nominate Shanice Walker."

President: "Shanice Walker is nominated. Are there any further nominations for president?"

If there are no further nominations for president:

President: "If not, nominations for president are closed." (Follow the same procedure until all nominations from the floor for all officers and directors are completed and nominations are closed.)

## VOTING PROCEDURE

Your club's election day is one of the most exciting meetings of the year. It's the day you, as club president, make an investment in the future of your club — as well as your club members — by "voting in" the next round of club leaders. To ensure smooth operations on election day, it helps to follow a process. Fortunately, Kiwanis has one. And it's easy to follow.

**Step 1:** Ensure that a quorum is present. A quorum is most commonly defined as more than half. However, for the club elections to be valid, a quorum is defined as at least one-third of the members. Because each member in good standing may vote electronically or by paper ballot for annual club elections, these members count toward your quorum.

**Step 2:** The president announces the offices to be filled and the candidates who have been nominated.

**Step 3:** Votes may be cast in four different ways: paper ballot, electronic voting, common consent or voice vote. Votes aren't cumulative. Candidates who receive a majority of votes cast are elected.

If the number of nominees for any office is the same as the number of vacancies, the president can declare candidates elected by "common consent" or by a "voice vote."

### By common consent

President: Announce the office and the candidate. For example: "If there is no objection, the chair declares Laura Conaway elected president."

### By voice vote

President: "As many as are in favor of Laura Conaway for president, say aye. Those opposed, say no. The ayes have it, and Laura Conaway is elected president."

If there have been no additional nominations from the floor, the entire slate recommended by the nominating committee can be elected similarly, one at a time.

## ELECTION RULES AND GUIDELINES

- Only active members in good standing may vote.
- For any office in which there are more nominees than vacancies, vote by ballot.
- Candidates must receive a majority of votes cast to be elected.
- You can define voting by proxy or absentee in your club policy.
- Your club can choose to give members the option of voting electronically via a secure website or by paper ballot. (Email is not an option.)
- Depending on your club's bylaws and policies, the secretary can either be:  
(1) elected at the annual meeting by the club membership, or (2) appointed within one week after elections are held.

Find details regarding election processes in your club bylaws or in the Standard Form for Club Bylaws at [kiwanis.org/newclubbylaws](http://kiwanis.org/newclubbylaws).

# Other aspects of club leadership

## Bylaws and local government requirements

### BYLAWS

**Does your club have a copy of its charter club bylaws in its historical files?**

If not, you may request a copy from Kiwanis International. Many clubs' files include their original rosters and bylaws.

What is your club's official charter date? (Hint: it's also on your club roster.)

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In October 2012, the Kiwanis International Board adopted a new Standard Form for Club Bylaws that provides greater flexibility and autonomy to clubs. It also includes club policies that may be personalized by each club — things like club meeting frequency, number of club directors, club committees and more. Note what items are available in club policies to customize for your club.

When you get home, take a look at your club's most current bylaws.

All clubs are asked to adopt the new Standard Form for Club Bylaws. The process is easy. The club board should first determine what personalized options should be included in the club policies. Provide at least 14 days advance notice to club members that the new bylaws will be considered at a particular club meeting. A quorum needs to be present at the meeting. To adopt the new bylaws, your club must get a two-thirds vote of those members present.

After that, your club bylaws may be amended as needed, with approval of the club members, to reflect long-term changes in club operations. An example would be a change in day or time of the club meeting.

**Tip:** To find the official paperwork and complete the online submission process, go to [kiwanis.org/newclubbylaws](http://kiwanis.org/newclubbylaws).

**Did your club incorporate with the state when it was chartered?**

If you are unsure, it's time to find out. Contact your local state agency to confirm the paperwork is on file and current. Be aware that incorporation must be renewed annually or according to your state incorporation laws.

Form <b>990</b>	<b>Return of the Organization of Exempt From Income Tax</b> Section 501(c)(3), 527, or 4947(a)(2) of the Internal Revenue Code (except bank and thrift institutions)	OMB No. 1545-0047	<b>2018</b>
Department of the Treasury Internal Revenue Service		<b>Open to Public Inspection</b> This return and the information provided on it will be made available to the public.	
▶ The organization may have been a charity in one or more prior years. See instructions.			
<b>For the 2018 calendar year, or for your beginning</b>		<b>2019, and ending</b>	
<b>1</b> <input type="checkbox"/> <b>Employer identification number</b>		<b>2</b> <input type="checkbox"/> <b>Employer identification number</b>	
<b>3</b> <input type="checkbox"/> <b>Business name</b> (Include name and street P.O. box. Do not add to avoid direct mailing.)		<b>4</b> <input type="checkbox"/> <b>Telephone number</b>	
<b>5</b> <input type="checkbox"/> <b>City or town, state, and ZIP + 4</b>		<b>6</b> <input type="checkbox"/> <b>501(c)3</b>	
<b>7</b> <input type="checkbox"/> <b>Form and address of preparer (if other)</b>		<b>8</b> <input type="checkbox"/> <b>Has this a group return effect?</b> <input type="checkbox"/> <b>No</b> If "Yes," attach a 5010-SS. <input type="checkbox"/> <b>No</b> If "Yes," attach a 5010-SS (see instructions)	
<b>9</b> <input type="checkbox"/> <b>Website</b>		<b>10</b> <input type="checkbox"/> <b>Has this a group return effect?</b> <input type="checkbox"/> <b>No</b> If "Yes," attach a 5010-SS (see instructions)	
<b>11</b> <input type="checkbox"/> <b>Website</b>		<b>12</b> <input type="checkbox"/> <b>Has this a group return effect?</b> <input type="checkbox"/> <b>No</b> If "Yes," attach a 5010-SS (see instructions)	
<b>13</b> <input type="checkbox"/> <b>Website</b>		<b>14</b> <input type="checkbox"/> <b>Has this a group return effect?</b> <input type="checkbox"/> <b>No</b> If "Yes," attach a 5010-SS (see instructions)	
<b>15</b> <input type="checkbox"/> <b>Website</b>		<b>16</b> <input type="checkbox"/> <b>Has this a group return effect?</b> <input type="checkbox"/> <b>No</b> If "Yes," attach a 5010-SS (see instructions)	
<b>17</b> <input type="checkbox"/> <b>Website</b>		<b>18</b> <input type="checkbox"/> <b>Has this a group return effect?</b> <input type="checkbox"/> <b>No</b> If "Yes," attach a 5010-SS (see instructions)	
<b>19</b> <input type="checkbox"/> <b>Website</b>		<b>20</b> <input type="checkbox"/> <b>Has this a group return effect?</b> <input type="checkbox"/> <b>No</b> If "Yes," attach a 5010-SS (see instructions)	
<b>21</b> <input type="checkbox"/> <b>Website</b>		<b>22</b> <input type="checkbox"/> <b>Has this a group return effect?</b> <input type="checkbox"/> <b>No</b> If "Yes," attach a 5010-SS (see instructions)	
<b>23</b> <input type="checkbox"/> <b>Website</b>		<b>24</b> <input type="checkbox"/> <b>Has this a group return effect?</b> <input type="checkbox"/> <b>No</b> If "Yes," attach a 5010-SS (see instructions)	
<b>25</b> <input type="checkbox"/> <b>Website</b>		<b>26</b> <input type="checkbox"/> <b>Has this a group return effect?</b> <input type="checkbox"/> <b>No</b> If "Yes," attach a 5010-SS (see instructions)	
<b>27</b> <input type="checkbox"/> <b>Website</b>		<b>28</b> <input type="checkbox"/> <b>Has this a group return effect?</b> <input type="checkbox"/> <b>No</b> If "Yes," attach a 5010-SS (see instructions)	
<b>29</b> <input type="checkbox"/> <b>Website</b>		<b>30</b> <input type="checkbox"/> <b>Has this a group return effect?</b> <input type="checkbox"/> <b>No</b> If "Yes," attach a 5010-SS (see instructions)	
<b>31</b> <input type="checkbox"/> <b>Website</b>		<b>32</b> <input type="checkbox"/> <b>Has this a group return effect?</b> <input type="checkbox"/> <b>No</b> If "Yes," attach a 5010-SS (see instructions)	
<b>33</b> <input type="checkbox"/> <b>Website</b>		<b>34</b> <input type="checkbox"/> <b>Has this a group return effect?</b> <input type="checkbox"/> <b>No</b> If "Yes," attach a 5010-SS (see instructions)	
<b>35</b> <input type="checkbox"/> <b>Website</b>		<b>36</b> <input type="checkbox"/> <b>Has this a group return effect?</b> <input type="checkbox"/> <b>No</b> If "Yes," attach a 5010-SS (see instructions)	
<b>37</b> <input type="checkbox"/> <b>Website</b>		<b>38</b> <input type="checkbox"/> <b>Has this a group return effect?</b> <input type="checkbox"/> <b>No</b> If "Yes," attach a 5010-SS (see instructions)	
<b>39</b> <input type="checkbox"/> <b>Website</b>		<b>40</b> <input type="checkbox"/> <b>Has this a group return effect?</b> <input type="checkbox"/> <b>No</b> If "Yes," attach a 5010-SS (see instructions)	
<b>41</b> <input type="checkbox"/> <b>Website</b>		<b>42</b> <input type="checkbox"/> <b>Has this a group return effect?</b> <input type="checkbox"/> <b>No</b> If "Yes," attach a 5010-SS (see instructions)	
<b>43</b> <input type="checkbox"/> <b>Website</b>		<b>44</b> <input type="checkbox"/> <b>Has this a group return effect?</b> <input type="checkbox"/> <b>No</b> If "Yes," attach a 5010-SS (see instructions)	
<b>45</b> <input type="checkbox"/> <b>Website</b>		<b>46</b> <input type="checkbox"/> <b>Has this a group return effect?</b> <input type="checkbox"/> <b>No</b> If "Yes," attach a 5010-SS (see instructions)	
<b>47</b> <input type="checkbox"/> <b>Website</b>		<b>48</b> <input type="checkbox"/> <b>Has this a group return effect?</b> <input type="checkbox"/> <b>No</b> If "Yes," attach a 5010-SS (see instructions)	
<b>49</b> <input type="checkbox"/> <b>Website</b>		<b>50</b> <input type="checkbox"/> <b>Has this a group return effect?</b> <input type="checkbox"/> <b>No</b> If "Yes," attach a 5010-SS (see instructions)	
<b>51</b> <input type="checkbox"/> <b>Website</b>		<b>52</b> <input type="checkbox"/> <b>Has this a group return effect?</b> <input type="checkbox"/> <b>No</b> If "Yes," attach a 5010-SS (see instructions)	
<b>53</b> <input type="checkbox"/> <b>Website</b>		<b>54</b> <input type="checkbox"/> <b>Has this a group return effect?</b> <input type="checkbox"/> <b>No</b> If "Yes," attach a 5010-SS (see instructions)	
<b>55</b> <input type="checkbox"/> <b>Website</b>		<b>56</b> <input type="checkbox"/> <b>Has this a group return effect?</b> <input type="checkbox"/> <b>No</b> If "Yes," attach a 5010-SS (see instructions)	
<b>57</b> <input type="checkbox"/> <b>Website</b>		<b>58</b> <input type="checkbox"/> <b>Has this a group return effect?</b> <input type="checkbox"/> <b>No</b> If "Yes," attach a 5010-SS (see instructions)	
<b>59</b> <input type="checkbox"/> <b>Website</b>		<b>60</b> <input type="checkbox"/> <b>Has this a group return effect?</b> <input type="checkbox"/> <b>No</b> If "Yes," attach a 5010-SS (see instructions)	
<b>61</b> <input type="checkbox"/> <b>Website</b>			

## 990 TAX FORM (U.S. CLUBS ONLY)

While the 990 tax form has been around for years, it wasn't well monitored by the U.S. government until recently. In the last few years, this has become a much bigger priority for the Internal Revenue Service. Incorporated clubs must submit one 990 tax form every year. If the 990 tax form is not submitted in a timely manner, your club's incorporation with the state may be at risk. This could result in the club losing its status as a 501(c)4 organization. This form is due February 15. Be sure your club treasurer knows to watch for this notice and to complete the form by the due date.

**Download tax form 990 at [irs.gov/pub/irs-pdf/f990.pdf](https://irs.gov/pub/irs-pdf/f990.pdf)**



Kiwanis International dues and fees:\*

US\$70: Kiwanis International dues and fees

US\$13: Liability insurance (North America and the Caribbean only)

US\$4: Directors and officers insurance (North America and the Caribbean only)

US\$8: Magazine subscription (for English-speaking members in North America)

In addition to Kiwanis International dues and fees, each district also collects dues and fees. These are unique for every district and are set by the house of delegates at a district event.

District dues and fees:

\$ \_\_\_\_\_ for \_\_\_\_\_

\$ \_\_\_\_\_ for \_\_\_\_\_

\$ \_\_\_\_\_ for \_\_\_\_\_

The club also has the option to set dues and fees that are retained directly by the club to cover or offset club operations. These monies stay in your club's administrative account.

Club dues and fees:

\$ \_\_\_\_\_ for \_\_\_\_\_

\$ \_\_\_\_\_ for \_\_\_\_\_

\$ \_\_\_\_\_ for \_\_\_\_\_

When your club receives an invoice from Kiwanis International for continuing members or new members, both the Kiwanis International and district costs are included when applicable. Also, Kiwanis International collects fees for the Kiwanis International European Federation. To simplify the payment process for clubs, Kiwanis International collects all of the district dues and fees and then distributes them appropriately to the districts.

*\*Depending on your country's Gross Domestic Product and location, the Kiwanis International dues and fees may be adjusted. This is defined in the Kiwanis International bylaws.*

**Tip:** Some divisions request a voluntary contribution to either the division or the lieutenant governor's office.

### **NEW-MEMBER ENROLLMENT FEE**

Effective October 1, 2013, clubs pay a fixed fee for each new member, regardless of the date the member joins Kiwanis. The new-member enrollment fee will continue to be tiered. Clubs in tier A nations will pay US\$50 for each new enrollee; tier B, US\$25; and tier C, US\$15.

The invoice provided to the club will reflect the appropriate amount. If you have any questions, contact member services at Kiwanis International.

## Club budgeting

As the incoming president, you're responsible for working with your treasurer to prepare a budget for the administrative and service accounts for the year. It's best if the budget is approved at the first board meeting of the year by the board that will serve with you. If at all possible, approve before October 1 — and no later than October 15.

### MONTHLY FINANCIAL REPORT ADMINISTRATIVE ACCOUNT

*This sample financial report for the club's administrative account is only intended as a guide. The list of accounts below has been condensed. Treasurers may adapt and expand the accounts as needed for their clubs.*

KIWANIS CLUB OF \_\_\_\_\_

MONTHLY FINANCIAL REPORT FOR MONTH ENDING \_\_\_\_\_

	BUDGETED AMOUNT	CURRENT MONTH	YEAR TO DATE
<b>ADMINISTRATIVE INCOME</b>			
Membership dues and fees			
Meals/guarantee assessment			
New member fees			
Interest income			
Drawings			
Other			
<b>Totals:</b>			

	BUDGETED AMOUNT	CURRENT MONTH	YEAR TO DATE
<b>ADMINISTRATIVE EXPENDITURES</b>			
Meals/guests			
Meals/members			
Membership dues and fees			
New member fees			
Club newsletter			
Committee expenses:			
• Membership			
• Marketing			
Delegates to:			
• Kiwanis International convention			
• District convention			
Gifts and flowers			
President's gifts			
Social activities			
Installation event			
Secretary salary/expenses			
Insurance and payroll taxes			
Office expenses			
<b>Totals:</b>			

	BUDGETED AMOUNT	CURRENT MONTH	YEAR TO DATE
<b>BANK AND CASH</b>			
<i><b>Balance summary:</b></i>			
Beginning of the month			
Current month income			
Less current month expenses			
End of the month			
Total funds in savings			
Total funds in checking			
Other investments			
<i><b>Total cash &amp; investments:</b></i> (should equal total balance of all funds)			

## Monthly financial report service account

*This sample financial report for the club's service account is only intended as a guide. The list below has been condensed. Treasurers may adapt and expand the accounts as needed for their club.*

KIWANIS CLUB OF \_\_\_\_\_

MONTHLY FINANCIAL REPORT FOR MONTH ENDING \_\_\_\_\_

	BUDGETED AMOUNT	CURRENT MONTH	YEAR TO DATE
<b>SERVICE INCOME</b>			
Fundraising activities			
Interest income			
<b>Totals:</b>			

<b>SERVICE EXPENDITURES</b>			
Club			
Division			
District			
Youth services			
• Terrific Kids			
• Bring Up Grades			
• K-Kids Read & Lead			
• Young Children: Priority One			
Service Leadership Programs			
• Builders Club			
• K-Kids			
• Aktion Club			
• Circle K International			
• Key Club			
• Key Leader			
Human and spiritual values			
Community services			
Fundraising costs			
Liability insurance expense			
Directors and officers insurance			
District foundation			
Kiwanis Children's Fund			
<b>Total service account expenditures:</b>			
<b>Net service account activity:</b>			

Administrative account examples:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
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Service account examples:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

# Club insurance

*(North America and the Caribbean only)*

Every district has a risk manager who is familiar with the general liability insurance coverage. Your district risk manager can answer your questions regarding the insurance programs available. So can Kiwanis International.

## GENERAL LIABILITY INSURANCE

The Kiwanis International Comprehensive General Liability Insurance program provides legal liability insurance for clubs, members and Service Leadership Program organizations when they become legally obligated to pay damages to third parties for bodily injury or property damage associated with a Kiwanis-family-sponsored function or activity. The program also provides directors and officers insurance that protects club or district assets and the assets of members against the cost of lawsuits.

This insurance covers clubs in the United States, Canada and the Caribbean. Clubs pay per member for this coverage. Payment is submitted with the payment of Kiwanis International dues. Clubs may pay insurance premiums from either administrative or service funds.

Information is available in the Club Insurance Resource Guide, which is sent to your club secretary each November. You can also find it at [kiwanis.org/riskmanagement](http://kiwanis.org/riskmanagement).

## OPTIONAL INSURANCE

While the general liability insurance program is required for clubs, there are additional insurance coverage options that the club may want to consider.

The Optional Insurance Resource Guide is available at [kiwanis.org/riskmanagement](http://kiwanis.org/riskmanagement). This guide includes information about crime insurance and club accident insurance. While you may want to look at a policy offered locally, Kiwanis has negotiated with a company to offer competitive rates for our clubs.



# Service clubs and initiatives for all ages and abilities

Since 1915, Kiwanis has empowered youth to become confident, capable and compassionate. The Kiwanis family also includes Service Leadership Programs, or SLPs, whose members range from elementary school to college — as well as adults with disabilities. Some Kiwanis clubs sponsor one or more of these SLP clubs in their area. Each of the programs is made possible by grants from the Kiwanis Children's Fund. Share the information below with your members if they ask where that funding goes.

## K-KIDS

### Where young leaders learn to help others

In ways large and small, K-Kids change the world around them and, in the process, transform themselves. Students lead the club, plan activities, participate in community service projects, celebrate their successes and develop empathy, self-confidence and compassion along the way. Through service to others they begin to understand the impact they can have on their school, their community and their world.

Primary/elementary school   [kkids.org](http://kkids.org)

## BUILDERS CLUB

### Building self-esteem at a pivotal age

Builders Club members are discovering who they want to become. Builders Club focuses all their raw potential into service for others — empowering them to be themselves, work together, make plans, set goals and take action. As they participate in club activities and events, students develop important social and emotional skills that help them make smarter decisions and avoid risky behavior.

Middle/junior high school   [buildersclub.org](http://buildersclub.org)

## KEY CLUB INTERNATIONAL

### Learning to lead with compassion

The dedication and enthusiasm of these students has been felt in communities across the globe since the program began in 1925. This student-led organization encourages leadership development through service to others. Students build confidence and character, learn to be effective, strive for academic achievement, create more inclusive environments in their schools and develop empathy for those less fortunate.

Secondary/high school   [keyclub.org](http://keyclub.org)

## **CIRCLE K INTERNATIONAL**

### **The next generation of community leaders**

Members of Circle K International (CKI) develop as leaders, make life-long friends and improve their world through service. The decision-making, problem-solving and team-building skills they learn while serving others are directly transferable to the jobs they will seek upon graduation. Dedication to community service is a hallmark of CKI. In fact, the CKI annual convention is centered around a large-scale service project that makes a positive impact on the host city.

**College/university students**    [circlek.org](http://circlek.org)

## **AKTION CLUB**

### **Where development has no disability**

Aktion Club is the one and only service club for adults with disabilities. Clubs are formed at or with various organizations that support individuals with disabilities, as well as other community programs. These caring adults develop confidence and character as they take on leadership roles in their clubs and direct service projects. Members gain a sense of purpose and personal satisfaction as they serve their communities, help others and discover their talents.

**Adults with disabilities**    [aktionclub.org](http://aktionclub.org)

## Other initiatives

In addition to the Kiwanis service clubs for kids, there are initiatives for students ages 6-12 who want to develop the character and skills that help them engage with the world around them.

### **TERRIFIC KIDS**

#### **A character-building program**

Terrific Kids help students become the best version of themselves. Participants determine what being terrific means to them, then develop their own goals and use peer mentoring to hold themselves accountable each week. When a participant achieves a goal, he or she is honored for being a Terrific Kid.

[terrifickids.org](http://terrifickids.org)

### **BRING UP GRADES (BUG)**

#### **Empowering kids in their academic success**

Bring Up Grades, or BUG, recognizes elementary students who raise their grades or maintain good grades from one grading period to the next. Students are motivated to excel because they set their own goals and participate in peer mentoring, which engages their classmates in their success. When they reach their goals, the entire class celebrates.

[bringupgrades.org](http://bringupgrades.org)

### **K-KIDS READ & LEAD**

#### **Introducing the power of reading to kids**

K-Kids Read & Lead kits empower kids to make positive changes in their schools and communities. Reading exposes them to tough societal issues while group discussions and follow-up activities allow them to express their thoughts, ideas and solutions — and even take action. Small and large kits are available on topics such as bully prevention, the environment, hunger, literacy and how ordinary people change the world. Kits include multiple copies of books along with reflection questions, ideas for follow-up activities and service projects. This program is a partnership with Penguin Random House.

[kkids.org/readandlead](http://kkids.org/readandlead)

## Kiwanis Youth Protection Guidelines

*(updated October 2016)*

There are more than 300,000 members in Kiwanis youth programs. Their care and safety is entrusted to every Kiwanis club member. For Kiwanis to be the premier provider of youth service clubs and programs, we must hold ourselves and fellow members to the highest standards of conduct and awareness.

Kiwanis International helps. The Kiwanis Youth Protection Guidelines are available to Kiwanians in every club. All adults working with anyone under age 18 at any Kiwanis event are expected to read, understand, agree to and abide by these guidelines.

The guidelines are reviewed annually by the Kiwanis International Board of Trustees to ensure that Kiwanis provides the current best practices for protecting both our youth and adult club members. For the latest guidelines, you can always go to [kiwanis.org/youthprotection](http://kiwanis.org/youthprotection).

**Tip:** A Youth Protection Guidelines e-learning course is available at [kiwanis.org/CLE](http://kiwanis.org/CLE).

### EDUCATION

Every Kiwanis club is expected to educate its members on the Kiwanis Youth Protection Guidelines. Each year, a club should provide members with a copy of the Guidelines with educational training — informing them of the highest standards of conduct and awareness.

In addition, every Kiwanis district is expected to help inform and educate. During every district-produced convention and conference, the district is expected to provide an educational forum or workshop regarding the Guidelines and best practices for adults who work with youth. Districts should use materials provided by Kiwanis International.

Every member should attend a training annually — whether offered by the club or district, or via the online tool.

## CHAPERONE

A chaperone is defined as a Kiwanis member, faculty member, parent, legal guardian or person who is *in loco parentis* and:

- 21 years of age or older.
- Approved by the school or agency.
- Registered with the school or agency to accompany the youth members at the specific event.

## CRIMINAL HISTORY BACKGROUND CHECKS

Kiwanis clubs are required to have a clear criminal history background check — conducted and verified by Kiwanis International — of any member serving as a Kiwanis advisor to any Service Leadership Program club (Aktion Club, Circle K, Key Club, Builders Club and K-Kids). Kiwanis International's criteria shall be followed to determine whether the background check is considered "clear." Background checks shall be valid for no more than two years.

SLP clubs that petition to charter will only be approved once the appointed Kiwanis advisor has a clear criminal history background check conducted by Kiwanis International. Clubs are strongly encouraged to ensure confidential background checks for all adults who will work directly with youth outside of the school and/or who may not have undergone a background check. The criminal history background check should conform to applicable local and state/provincial laws and requirements.

Kiwanis International requires clear criminal history background checks conducted by its provider for all adults working with youth at all Kiwanis International-sponsored events. These include the Key Club International Convention, the Key Club Governor and Administrator training conference, the Key Club International Leadership Conference, and any Key Leader weekend.

All district chairpersons and committee members for all Service Leadership Programs are required to have a clear criminal history background check conducted by Kiwanis International. A district may also require criminal history background checks for other adults working with youth as part of district programs or events.

(See Kiwanis International Policy B and Procedure 197 for complete information regarding criminal history background checks.)

## **OVERNIGHT STAYS**

While attending a Kiwanis event that requires overnight stay in a hotel or camp/conference setting, adult chaperoning must include no fewer than one adult male for each 10 or part of 10 youth males, and one adult female for each 10 or part of 10 youth females.

Except for a parent sharing a sleeping room or other sleeping quarter (e.g., a tent) with his/her own child, no adult should share a hotel or dormitory sleeping room or other sleeping quarter with a youth. In the event that sleeping quarters consist of multiple beds, such as a bunkhouse or camp cabin, adults may share the sleeping quarters with youth members of the same gender, provided that two or more adults are present.

## **TRANSPORTATION**

When transporting youth, the best practice is to have three people in the car at all times, with documented approval from the parent or guardian for the transportation arrangements. When both of these conditions cannot be met, one of them should be. All transportation decisions should be made in accordance with local laws and school policies.

## **USE OF ALCOHOLIC BEVERAGES, TOBACCO, MARIJUANA AND OTHER SUBSTANCES**

The possession of prescription and nonprescription (over-the-counter) medications by youth at a Kiwanis event should be permitted only with the written permission of the parent/guardian.

## **MEDICATIONS**

While attending any Kiwanis event that is produced primarily by or for the benefit of youth, adults are expected to refrain from using or being under the influence of alcoholic beverages, tobacco, and/or marijuana products, even if prescribed for medicinal use. In addition, the use and/or possession of illegal drugs or the improper/illegal use of legal drugs is prohibited.

## REPORTING

If a Kiwanian observes troubling behavior involving a youth at a Kiwanis event or becomes aware of a situation that is illegal or potentially unsafe for a young person at a Kiwanis event, he or she must immediately contact the appropriate personnel at the event and provide notification to law enforcement personnel as appropriate. If the Kiwanian becomes aware of the troubling behavior after the event, he or she must contact leaders of the event and provide notification to law enforcement personnel as appropriate. All local, state, provincial and federal laws regarding reporting must be followed.

## PERSONAL INFORMATION

All documents bearing personal information of any youth attending a Kiwanis event — including registration forms, medical information forms, permission-to-treat forms, etc. — should be treated as confidential. Processes that protect this information must be created, including minimizing the number of people who have access to any such documents. The documents shall be maintained for a minimum of three years or longer, as may be required by applicable state/provincial laws and regulations. After the maintenance period has expired, the documents shall be destroyed in a way that maintains confidentiality, such as shredding. The disposal and destruction of all confidential information shall conform to applicable state/provincial laws and regulations.

**Tip:** These policies can be found in Kiwanis International Policies and Procedures as Procedure 432.

## YOUTH AND SOCIAL MEDIA

For any social networking site that involves requesting a connection (such as inviting someone to be a friend on Facebook), adults should never initiate such connections with youth. If a youth requests such a connection from a Kiwanian, he or she should use their best judgment in responding. Adults should treat their interaction with youth on social networking sites as though the interaction were occurring in public, in front of other adults and young people. In other words, if it would not be appropriate to say something to a young person in public, it should not be said as a comment on a social networking site either.

Kiwanians should refrain from interactions that can be seen as excessive (such as constantly “liking” or commenting on a person’s posts on Facebook). Prior to posting any media online, such as photographs, obtain permission from any and all individuals (or parents for minors) who appear in those media; it could be illegal to do otherwise. (See Kiwanis International Policy B for complete social media guidelines.)

## **BEHAVIORAL OR HEALTH ISSUES**

Kiwanians are often seen by a young person as an adult to trust with personal and/or sensitive information. Kiwanians should refrain from counseling youth and should instead find, or assist the young person in finding, appropriate expert assistance.

## **CONFLICTS WITH OTHER RULES**

Whenever these guidelines conflict with local school policies or rules, or local state/provincial or national laws or regulations, the highest applicable standards for conduct shall prevail.



# Kiwanis Children's Fund

Kids need Kiwanis, and the Kiwanis Children's Fund helps you reach them — amplifying your impact in communities around the world. A trusted partner staffed by experts, the Children's Fund knows how to turn money into something much more meaningful.

Gifts go to specific Kiwanis causes that Kiwanians have said are important to them:

- **Service Leadership Programs.** We're helping build a stronger generation of leaders and service volunteers.
- **Club and district service projects.** We help clubs and districts fulfill the unmet needs of children in their communities.
- **Disaster relief.** We make sure that when a disaster strikes, the Kiwanis family can respond.
- **The Eliminate Project.** We are eliminating a painful, preventable disease that kills mothers and babies around the world.
- **Iodine Deficiency Disorders.** We saw a mental health problem that could be cured, so we did it. Now we're sustaining that work.

To learn more about applying for a club, district or disaster relief grant, visit [kiwanischildrensfund.org](http://kiwanischildrensfund.org).

**Tip:** To better reflect our mission of serving children, the Kiwanis International Foundation changed its name to the Kiwanis Children's Fund in October 2016. This new name better conveys the purpose of our organization: We serve children. And it describes how: We raise funds to support Kiwanis initiatives.

## Club Grant program

The Kiwanis Children's Fund can be a resource for your club's service project through the Club Grant program. A club grant helps address an unmet need that affects children in your community or elsewhere by supporting a project that provides long-term benefits that can be sustained by the club.

For the Children's Fund, a grant is a form of collaboration. When a Kiwanis club has a gap in its funding for a service project, a club grant can help fill it.

Clubs may complete the first step of the application process (a Letter of Inquiry) at any time throughout the year, but grants are awarded in June, October and January.

Not all projects are eligible for a club grant. You can find the full list of requirements and information about the application process in the Guide to Club Grants online. In general, projects should:

- Be Kiwanis-led.
- Fill a documented need within the community.
- Recur at least once per year.
- Support activities within one of the Children's Fund cause areas (health, education or youth leadership development).

Visit [kiwanischildrensfund.org/clubgrants](http://kiwanischildrensfund.org/clubgrants) for key dates and a library of translated resources, including the Guide to Club Grants. Please direct questions to the Children's Fund team at [grants@kiwanis.org](mailto:grants@kiwanis.org). You can also call 1-800-KIWANIS, ext. 225 (U.S. and Canada), or +1-317-217-6225 (worldwide).

## Resources for your club

Every Kiwanis district has a dedicated Children's Fund staff member, a development officer who serves as a resource for you, your club and your district. Find your development officer at [kiwanischildrensfund.org/staff](http://kiwanischildrensfund.org/staff).

Here are a few examples of how the Children's Fund can be a resource for your club:

- **Looking for a speaker for your club meeting?** Your development officer or a Children's Fund volunteer can visit your club in-person or virtually and provide updates on the Kiwanis Children's Fund, including The Eliminate Project.
- **Need help establishing and managing a club or district foundation?** The Children's Fund can guide you through this process and ensure that your foundation is following best practices.
- **Looking to develop a fundraising plan?** The experts at the Children's Fund can guide your club in creating an action plan to boost your fundraising efforts.
- **Interested in applying for funding for a new project?** See the previous section for more information on the Club Grant program.

Of course, feel free to reach out to the Kiwanis Children's Fund at any time at 1-800-KIWANIS, ext. 254 (U.S. and Canada), or +1-317-217-6254 (worldwide).

## CLUB FOUNDATIONS

Some Kiwanis clubs have their own foundations that accept tax-deductible donations. If your club has a foundation, you must follow the Bylaws and Articles of Incorporation for Kiwanis Club Foundations. The Kiwanis Children's Fund offers relevant resources, all of which reflect current best practices under U.S. tax law.

You can find guidelines for club foundations, bylaws, articles of incorporation and even steps to establishing a club foundation. For information, go to [kiwanischildrensfund.org/foundation-resources](http://kiwanischildrensfund.org/foundation-resources).

