

LEADERSHIP GUIDE



THIS BOOK BELONGS TO

MY CLUB

MY ROLE

MY GOAL



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IT'S TIME TO GET STARTED!

You have been called to lead. Your fellow Kiwanians believe you have the talent and determination to fulfill your responsibilities as a Kiwanis club officer. In this guide, you'll find the tools and resources you need.

After all, your leadership will make your club healthier. And that will make Kiwanis stronger. As a result, children's lives will be changed in your community — and all around the world.

ABOUT TRADITION

The information in this guide is geared toward Kiwanis clubs that follow a traditional meeting structure. Many groups, such as internet-based clubs, club satellites and young professionals clubs, have chosen different formats for their meetings and service initiatives. If you're in a nontraditional group, feel free to modify this guide to suit your needs.





KIWANIS 101

KIWANIS 101

Kids need Kiwanis. For more than a century, Kiwanis has created opportunities for children to be curious, safe and healthy — regardless of the community in which they live. When you give a child the chance to learn, experience, dream, grow, succeed and thrive, great things can happen.

That’s what Kiwanis members do. We are generous with our time. We are creative with our ideas. We are passionate about making a difference. And we have fun along the way.

MOTTO

Serving the children of the world.

DEFINING STATEMENT

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

VISION STATEMENT

Kiwanis will be a positive influence in communities worldwide...*so that one day, all children will wake up in communities that believe in them, nurture them and provide the support they need to thrive.*

THE OBJECTS OF KIWANIS

- Object 1:** To give primacy to the human and spiritual rather than to the material values of life.
- Object 2:** To encourage the daily living of the Golden Rule in all human relationships.
- Object 3:** To promote the adoption and the application of higher social, business, and professional standards.
- Object 4:** To develop, by precept and example, a more intelligent, aggressive, and serviceable citizenship.
- Object 5:** To provide, through Kiwanis clubs, a practical means to form enduring friendships, to render altruistic service, and to build better communities.
- Object 6:** To cooperate in creating and maintaining that sound public opinion and high idealism which make possible the increase of righteousness, justice, patriotism, and goodwill.

KIWANIS INTERNATIONAL'S STRATEGIC PLAN

Think of a strategic plan as an organization's road map: You can choose the roads you want to take, but the strategic plan ensures we reach our destination — our goals. Our strategic plan is designed for each district and club to use as a guide to create and update their own plans and choose their own paths toward accomplishing common goals.

MEMBERSHIP AND ENGAGEMENT

Build, retain and support a growing Kiwanis membership network.

LEADERSHIP AND EDUCATION

Develop competent, confident and caring leaders across the Kiwanis family.

COMMUNITY IMPACT

Perform meaningful service, with service to children as our priority.

FINANCIAL VIABILITY

Ensure financial viability and responsible stewardship.

BRANDING AND IMAGE

Enhance the Kiwanis image and brand worldwide.

For additional information regarding the strategic plan, go to kiwanis.org/strategic-plan.



Your club's strategic plan

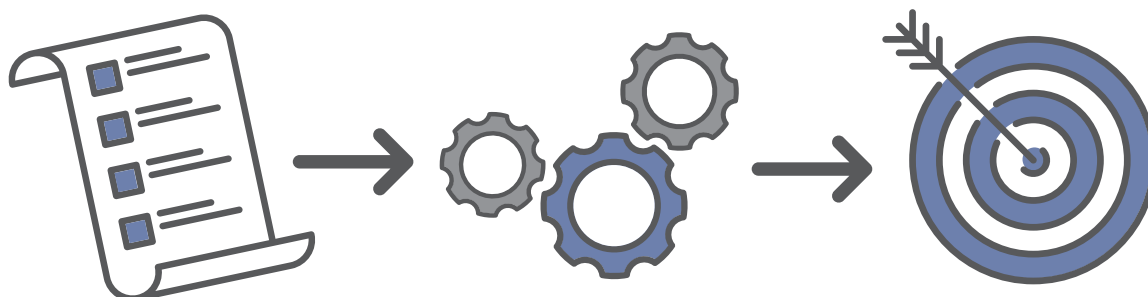
Your club should have a strategic plan in place, but it is important to revisit and revise it over time. Creating or revising your club's strategic plan is a group effort. Your club officers, board of directors and a few committed members need to work together to create a plan that will help your club thrive for years to come. Your strategic plan committee should be diverse in background, experience, age, gender, talents and perspectives.

MEMBERSHIP AND ENGAGEMENT

Club strategies	How will you accomplish the strategies?

LEADERSHIP AND EDUCATION

Club strategies	How will you accomplish the strategies?



COMMUNITY IMPACT

Club strategies	How will you accomplish the strategies?
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FINANCIAL VIABILITY

Club strategies	How will you accomplish the strategies?
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BRANDING AND IMAGE

Club strategies	How will you accomplish the strategies?
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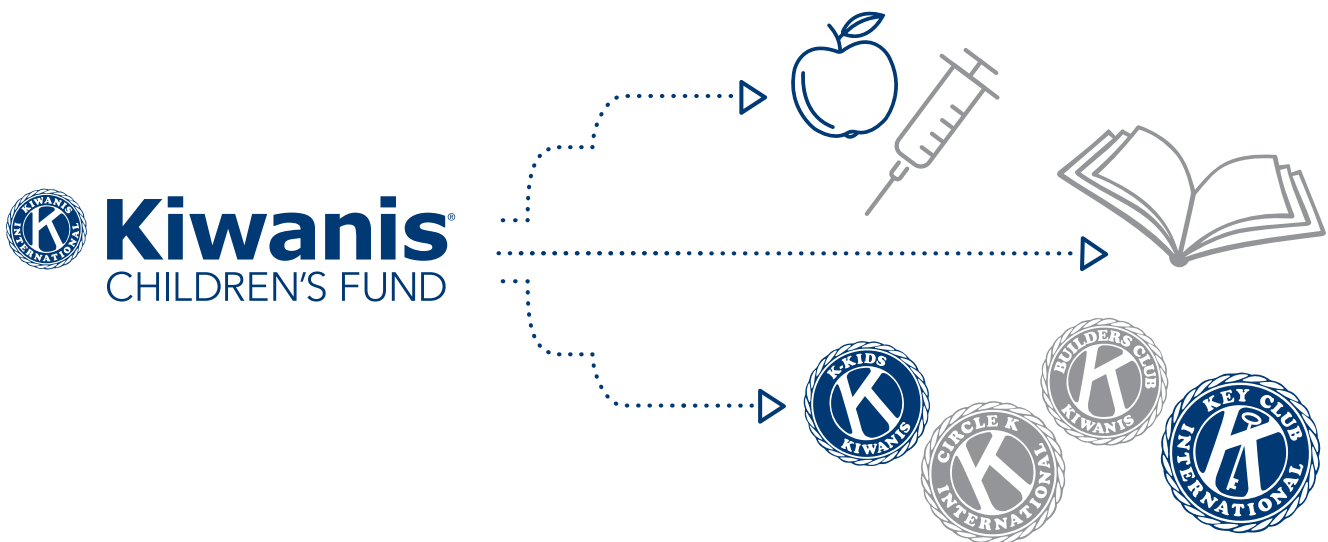
Kiwanis Children's Fund

As a club leader, you will be an important partner to the Kiwanis Children's Fund. Of course, you're also an advocate for the Children's Fund. So it's important to know what we do and how gifts help the Kiwanis family reach kids in need.

The Kiwanis Children's Fund partners with clubs and districts to help the children of the world by focusing the generous gifts of donors on three Kiwanis causes:

- Health and nutrition.
- Education and literacy.
- Youth leadership development.

In your role, you will be supported by a Children's Fund district chair and a Children's Fund ambassador who are appointed by the Children's Fund trustees. These volunteer leaders are passionate advocates of our mission. They are constant communicators of our core values through club and district presentations. They build and strengthen relationships with Kiwanis clubs in their districts.



A CONTINUUM OF IMPACT

From the prenatal stage to the age of 18, kids benefit from Kiwanis service. In fact, the Kiwanis causes create a continuum of impact. That's because each cause provides kids with a head start on the next one.

Sufficient nutrition offers the best chance at a healthy start in life — including optimal iodine intake, which influences brain development.

A healthy brain then prepares a kid for school, particularly for the crucial ability to read.

And an educated, literate child is one who's equipped to become a leader. Kiwanis Service Leadership Programs help develop students' skills as they continue their academic journeys — preparing them to become the next generation of leaders.



OPERATIONS

For each Kiwanis year (October 1–September 30), the Kiwanis Children’s Fund Board of Trustees is appointed to oversee the administration of the Kiwanis Children’s Fund. The board’s responsibilities include:

- Development and implementation of a strategic plan for the Children’s Fund.
- The stability and growth of the Children’s Fund via the cultivation of donor relationships and

the solicitation of financial gifts from individuals, friends and businesses.

- The monitoring and distribution of funds from fundraising programs for grants worldwide.

The Kiwanis Children’s Fund is managed by a staff that includes the executive director and chief philanthropy officer at the Kiwanis International Office in Indianapolis, Indiana, United States.

RESOURCES FOR CLUBS

The Kiwanis Children’s Fund makes it easy for Kiwanians to help kids — and to spread the word about what we do. Kiwanis clubs, districts and foundations can turn to us for answers and assistance in key areas of expertise.

Fundraising

We can offer strategies and advice for raising funds through individual and corporate giving, grant applications, planned giving and events. And when you tell us what works for you, we can pass along your best ideas to others.

Nonprofit management

Operating a club foundation can be complicated. Bring us your questions and challenges. We’ll help

you identify answers, options and best practices to help you reach your goals.

Kiwanis grant programs

Our staff is ready to answer your questions about the grant programs available to Kiwanis clubs.

Speakers and presentations

Whether it’s presented by one of our volunteers or a staff member, the Kiwanis Children’s Fund is ready to bring information and inspiration to club meetings.

Service Leadership Programs

Kiwanis has been sponsoring youth programs since the first Key Club was chartered in 1925. Since then, other programs have been added — including Aktion Club for adults with disabilities — and each has enjoyed tremendous growth. Around the world, these Service Leadership Programs (or SLPs) have become core projects of sponsoring Kiwanis clubs. Each SLP belongs to one of two categories: service clubs or initiatives.

SERVICE CLUBS

	EST.	MISSION	STATS	NOTES
Aktion Club Adults (18 and older) who have a disability	1987	To provide adults with disabilities an opportunity to develop initiative, leadership skills and to serve their communities	11,226 members, 514 clubs, 14 nations	Since this is a club for adults with disabilities; be careful not to identify SLPs collectively as “youth programs.”
Circle K International (CKI) Students enrolled at an institution of higher education	1936	To develop college and university students into a global network of responsible citizens and leaders with a lifelong commitment to service	11,076 members, 502 clubs, 17 nations	CKI is governed by a student board comprised of current members
Key Club High school students ages 14–18	1925	Key Club is an international, student-led organization providing its members with opportunities to perform service, build character and develop leadership.	251,899 members, 5,281 clubs, 40 nations	Key Club is led by a student board of current members.
Builders Club Middle school students ages 11–14	1975	Builders Club is an international, student-led organization providing members with opportunities to perform service, build character and develop leadership.	38,375 members (estimated), 1,535 clubs, 19 nations	Currently, Kiwanis tracks the number of clubs worldwide with corresponding estimates of membership numbers.
K-Kids Elementary school students ages 6–12	1990	K-Kids is an international, student-led organization providing members with opportunities to perform service, build character and develop leadership.	36,300 members (estimated), 1,452 clubs, 26 nations	As with Builders Club, Kiwanis tracks the number of clubs worldwide, with corresponding estimates of membership numbers.

Statistics as of December 2019

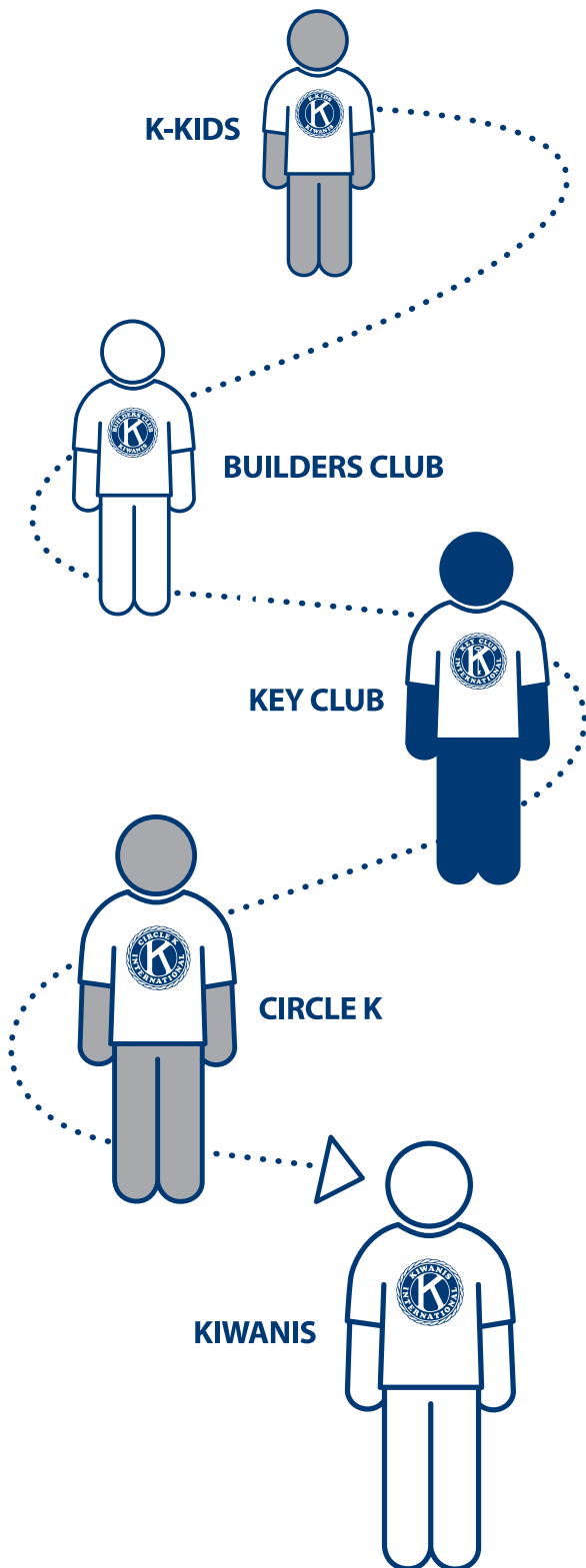
INITIATIVES

<p>Key Leader</p>	<p>Key Leader is an experiential leadership program for high school and graduating 8th grade students. The curriculum features modules on six principles: leadership, integrity, personal growth, respect, community and pursuit of excellence. The experience includes full group sessions led by a trained facilitator and small discussion groups called “neighborhoods.” A challenge course of team-building activities is also featured. Since 2005, there have been more than 30,000 graduates around the world. A team of Kiwanis district volunteers coordinates marketing and on-site logistics and generates financial support for students to attend. That team is led by a district chair and site coordinator (for each event) appointed by the district governor. Virtual Key Leader introduces the concepts of Key Leader in a free, downloadable pdf.</p>
<p>Terrific Kids</p>	<p>Terrific Kids is a character-building program that recognizes students for modifying their behavior. The program encourages kids to 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 for the actions they take each week. When a participant achieves their goal, they’re honored for being a Terrific Kid.</p>
<p>Bring Up Grades (BUG)</p>	<p>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 involves their classmates in their success. When they reach their goals, the entire class celebrates.</p>



GLOBAL LEADERSHIP CERTIFICATE

These online courses are based on Key Club's and CKI's core values of fellowship, leadership and service. Students will learn traditional skills as well as in-demand soft skills such as emotional intelligence, empathy, resiliency and more. This program won't just help them stand out as a candidate for colleges/grad school, trade schools or employers — it will also help them become stronger leaders and changemakers.



SPONSORSHIP OF A SERVICE LEADERSHIP PROGRAM

The role of the sponsoring Kiwanis club:

- Initiates organization of the sponsored club.
- Obtains approval of school officials for its establishment if it is a school-based organization.
- Assists with inviting initial members.
- Schedules the organization meeting.
- Files the Petition for Charter.
- Plans for the Charter Presentation event.
- Provides continuous coordination, counsel, assistance and instruction as agreed to in the sponsorship requirements.

SPONSORSHIP OBLIGATIONS

These guidelines will help you powerfully and positively influence the SLP clubs you lead.

1. Appoint a Kiwanian or a committee of Kiwanians to be SLP advisors.
2. Attend SLP meetings and events.
3. Maintain an expense line item in the service account.
4. Meet with the school principal or facility manager each year.
5. Ensure all dues and fees are paid.
6. Make sure SLP officers receive proper training.
7. Schedule an annual meeting with Kiwanis and SLP leadership.
8. Host or participate in joint activities.
9. Invite SLP club members to attend Kiwanis meetings.
10. Ensure SLP members are provided training opportunities beyond the club level.

The guidelines only pertain to sponsored clubs, not programs/initiatives. Find sponsorship resources, including an online sponsorship toolkit, at kiwanis.org/advisor.

Signature projects

From playgrounds and parks to festivals and fundraisers, signature projects are the hallmarks of what Kiwanis clubs are known for in their communities. They are important for the future of Kiwanis — because they elevate awareness of the organization in local communities, build member loyalty through project engagement, provide high-impact service and maximize community resources. Additionally, signature projects can increase membership and member engagement through high-impact community events. Consider how your club can incorporate potential new members into your next signature project.

To identify a signature project for your club, ask: “What community activity or event is my club known for and does it adequately represent the club?”

CRITERIA

A signature project is one that includes all of the following criteria:

- **Membership-focused.** The project should support opportunities to strengthen membership and develop new partnerships.
- **Recurring.** At a minimum, the project should take place annually or be set up to recur at regular intervals.
- **Brand-enhancing.** The project should elevate the brand identity of Kiwanis in the local community with opportunities for public relations activities such as Kiwanis naming rights, media inclusions, branding, etc.
- **High-impact.** The project should have a demonstrable positive impact on the community. This impact should be measurable in monies raised, children served, flags hung, playgrounds built, etc.

SIGNATURE PROJECT BEST PRACTICES

Step 1: Choose a project to benefit kids.

Select a project that will last for years to come and that your Kiwanis club will be known for throughout the community.

Step 2: Bring your project to life

Now that your club has selected a project, it's time to start.

Step 3: Work with our partners.

Kiwanis has created partnerships that align with our mission and preserve the trust of our members and communities.

Step 4: Get budget-boosting help.

Use resources that help clubs save money and stretch their dollars. There's a large selection and a little bit of everything at kiwanis.org.

Step 5: Report your success.

Reporting qualifies clubs for special recognition and helps Kiwanis form more partnerships in support of signature projects.

ANNUAL SIGNATURE PROJECT CONTEST

Kiwanis International hosts the annual Signature Project Contest to recognize clubs for the creative, engaging and impactful community fundraisers or service projects they conduct on an annual basis. The contest consists of two tiers based on club size. The top 10 club projects from each tier are selected from the hundreds of entries received annually. The final three in each tier receive recognition and awards at the Kiwanis International convention.

For the resources and step-by-step guides, check out the signature project toolkit at kiwanis.org/signature. For the most up-to-date list of partnerships and news, visit kiwanis.org/partners.



PRESIDENT

PRESIDENT

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 will fulfill the Kiwanis mission at the club level and beyond. Prepare well. Be a leader who inspires, counsels and steers your club in the direction of membership and service.

RESPONSIBILITIES

As presiding officer of the club and the board, the president works closely with the board of directors and committee chairs to establish and follow a strategic plan, set goals for improving the members' club experience and increase the club's impact in the community by adding new members. Club presidents will find a list of resources online at kiwanis.org/leadershipguide.

SKILLS

- Team-building.
- Motivating others.
- Effective communication.
- Inclusiveness.

DUTIES

- Lead the club's goal-setting process.
- Organize an effective leadership team by appointing and training effective committee chairs.
- Support committee activity to ensure a successful club experience.
- Ensure that the club continues to be relevant to the community and to the members through periodic assessments.
- Facilitate fun, educational and efficient club meetings.
- Lead effective and efficient board meetings.
- Implement a succession plan for future leaders, ensuring a seamless transition.
- Reward and recognize member and committee achievements.
- Fulfill all other duties documented in the Standard Form for Club Bylaws.

OVERSEES/DELEGATES

- Establish a strategic plan for the club, including goals for membership and community service.
- Gain an understanding of sponsorship responsibilities to Service Leadership Programs.
- Provide club members with Kiwanis' Youth Protection Policies.
- Communicate regularly with club members to keep them informed about the clubs' business and activities.
- Promote interclub and division council meeting participation.
- Encourage district midyear, district convention, and Kiwanis International convention attendance.
- Publicize goals that a club or member must meet in order to be deemed distinguished.

REVIEW

1. Put a star next to the responsibilities and duties your club is doing well.
2. Circle the responsibilities and duties your club is not currently doing.

If you are struggling with any of the outlined duties, please reference kiwanis.org/leadershipguide.

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 and determine whether they still meet your community's needs.
- Conduct a community survey 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.

FUN

- Plan special events at least four times a year exclusively for club members and their families. Invite a fellow member to coordinate. Ideas include: Local sports team games, dinner theater, 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.

STRENGTH

- Conduct a member satisfaction survey 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.
- Have meaningful club meetings with an agenda.
- Conduct at least one concentrated membership drive campaign during the year.
- Establish a new member orientation. If your club already does this, seek members' input on possible improvements.
- Make sure that new members receive a meaningful induction.
- Use every possible opportunity to recognize club members and honor their efforts.

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' or dentists' waiting rooms.
- Display 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.

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.

THINK ABOUT IT

What qualities do you think make a great leader?



Club committees and their leadership

Start building your leadership team by choosing reliable and collaborative committee chairs. Your club committees plan fundraising events, invite and educate new members, and develop service projects — for the most part, this is where the actual work takes place. Your club’s committee chairs play a key role in connecting new and seasoned members to the work your club does in your community and beyond. That’s why you’ll want to be thoughtful about who you choose to put in committee leadership roles. Together you and your committee chairs will establish goals for the year. You’ll give them guidance, share general expectations and schedule regular checkpoints.

YOUR CLUB’S COMMITTEES

Each club has a list of standing committees within its bylaws, and many clubs have continued to add committees for different functions, such as support for specific fundraisers and service activities. Your standing committees likely include:

- | | | |
|-------------------|------------------|-----------------------------|
| Financial review* | Education | Special events |
| Membership | Public relations | Service and fundraising |
| Growth | Programs | Community services |
| Retention | Club meetings | Service Leadership Programs |

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

**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.*

THINK ABOUT IT	
What other special committees does your club have?	Will any of these special committees have completed their task by the end of the current year?
Will there be any additional committees added during your year as president?	
Can any of your committees be broken down into subcommittees?	

TIMELINE

By July 15, appoint all committee chairs. Report your public relations and membership committee chairs to Kiwanis International via the secretary dashboard. By August 1, chairs need to 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 at kiwanis.org/ACEtools.

COMMITTEES IN YOUR CLUB

Current leader	Term end date	Possible successor

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.

THINK ABOUT IT

What are your goals for your club during your year as president? (It is important to limit the number of goals you set for your presidency.)

Who should you invite to participate in your planning conference?

Are there any meetings you need to have ahead of your official conference?

For information on goal setting, visit kiwanis.org/leadershipguide.

Club president-elect/vice president

The roles of president-elect and vice president are already defined in your club bylaws and policies.

DUTIES AND RESPONSIBILITIES

- Serves as an officer on the board of directors.
- Serves a one-year or two-year term, as provided in club policy.
- Attends meetings of the board of directors.
- In the absence of the president, presides at club meetings and meetings of the board of directors, in accordance with club policy.
- Performs other duties as assigned by the president or the board of directors.

Throughout the year, the president-elect or vice president prepares to assume the leadership role of president by working closely with the current club president and attending division council meetings, district conventions and possibly the Kiwanis International convention. It's the club president's job to include these leaders in discussions and meetings, delegate tasks to them and encourage their participation in Club Leadership Education.

THINGS TO TELL YOUR SUCCESSOR

As club president, you are responsible for coaching your successor. Prepare the next president to fill your shoes and help your club continue to grow. Pass along what you've learned about some important facts:

Leadership begins before you take office. Your successor should have the club's confidence and demonstrate a willingness to take input from other members. As the next Kiwanis year approaches, encourage communication with other key members and their involvement in the transition process.

Discuss the challenges you faced. Be honest about anything that didn't work and the issues you confronted. Share advice on how to meet them.

Focus on the future. Leadership brings success by looking forward. Concentrating on what's already happened — both the good and the bad — will only leave everyone focused on the past.

Behavior matters. A club president is a role model for members and fellow officers — and the club's spokesperson in your community.



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.
- Establishes goals for the club, in consultation with the club board of directors, which align with the club’s strategic plan.
- Serves as *ex-officio* member of all standing and special committees.

NOTE

A board member may not also be part of the financial review committee.

There might also be other duties assigned to the board in your club bylaws and policies.

PURPOSE OF THE CLUB BOARD

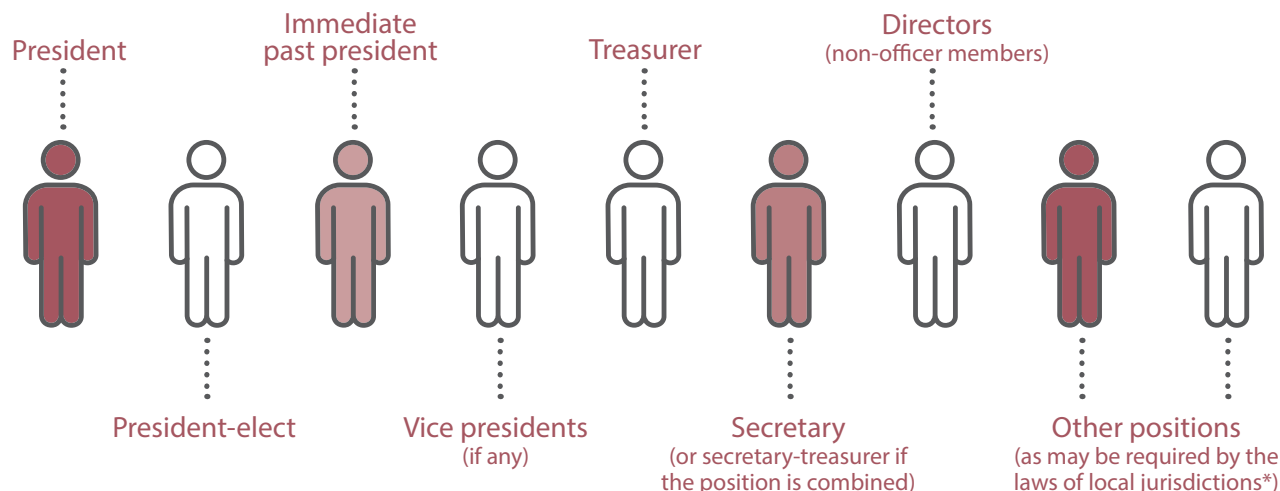
Every Kiwanis club has a board of directors to ensure smooth club operations, to lead club initiatives, and to create and uphold the club’s vision — all with the club’s best interests in mind. Most of the board’s tasks are related to these functions: administration, decision making and strategic planning. Some administrative tasks include:

- Determining the good-standing status of members in accordance with club policy.
- Setting an annual budget (before October 15 each year).
- Assuring the club complies with applicable governmental rules and regulations.
- Overseeing the implementation of club policy.
- Keeping club’s strategic plan current.
- Assuring 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.
- Other duties as assigned to the board in your club bylaws and policies.

NOTES

STRUCTURE OF THE CLUB BOARD

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



**Generally 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- 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 simultaneously communicate with each other. This may include online technology such as GoToMeeting or Skype, conference calls or email. However the conversation takes place, participation constitutes attendance. 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. Without a quorum present, the board should not take any formal action.

When in doubt, Kiwanis will refer to "Robert's Rules of Order" as the 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.

NOTE

Any club member can voluntarily attend board meetings.

THINK ABOUT IT

Draft an agenda for your ideal board meeting.

Did you check if a quorum was present?

Did the secretary give a report?
The treasurer?

How formal is your agenda?

For details on the board of directors meeting agenda and to see samples, visit kiwanis.org/leadershipguide.

Installations and inductions

As club president, you are responsible for the installation of club board members and officers as well as the induction of new club members.

INSTALLATION OF CLUB BOARD MEMBERS AND OFFICERS

There are a lot of moving pieces and parts required for a successful installation ceremony. It's a time to showcase the talents of your members and the impact they have on their community. 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.

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.

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

For additional resources on installation ceremonies, please visit kiwanis.org/leadershipguide.

INDUCTION OF 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.

A new member orientation PowerPoint is available as a downloadable resource that includes a suggested script and ways to personalize it to reflect your club information. It's best to begin new member orientation before a member joins so they understand the vision of the club and responsibilities of membership.

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).



Mentoring

By pairing new members with mentors, you give 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.

Induction ceremony

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

THINK ABOUT IT

Which members might be great mentors?

Which members might make amazing future presidents or other officers?

THINK ABOUT IT

Does your club have any traditions for their induction ceremonies?

How do you make your new members feel special?

Club meetings

THE BEST SHOW IN TOWN

As president, you set the tone for your club. These guidelines are here to help. Remember, you don't have 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 any visiting Kiwanis leaders (e.g., governor, lieutenant governor, etc.) in a prominent location 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.
- Develop a standard time agenda, designate who will have the floor for each action, brief all participants on their roles and begin and end the meeting on time.
- 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 another 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 delegations from other clubs, visiting Kiwanians, potential members, representatives of Service Leadership Programs and other guests.
- At every meeting, recognize the achievements of members and committees — and express thanks on behalf of the club.

THINK ABOUT IT

What makes your club unique?

WORKING WITH SPEAKERS

This list will make it easy for you or a member who is 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 in advance of 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.).
 - ♦ Appropriate attire.
- Request the spelling and pronunciation of the speaker's name and a résumé for publicity and an introduction.
- Ask a member to greet the speaker and introduce him or her to you and other members.
- Ensure 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).
- Add a properly branded Kiwanis logo to your podium or lectern for photo opportunities.
- Before the presentation, offer a brief, formal introduction of the speaker. Say thank you to a speaker with 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. A day or two after the speaker's visit, send a note of appreciation from the club.
- Many clubs make it a practice to rise and applaud when the speaker is introduced or at the conclusion of the presentation. If this isn't happening naturally and you'd like to introduce your club to the practice, present the idea to your club members at an appropriate time.
- Send a note of appreciation on behalf of the club.
- Lastly, don't forget to invite your speaker to join your club!

NOTES



SECRETARY

SECRETARY

Your diligence and passion inspired your fellow Kiwanians to give you one of the club's most important jobs. By maintaining accurate club and membership records, keeping official meeting minutes and making connections in the community, you'll keep your club informed and engaged. The information you submit will reflect the relative health and vibrancy of your club. Your club's leadership team will be stronger and more efficient, thanks to your communication skills and attention to detail.

RESPONSIBILITIES

The club secretary ensures club operations run efficiently and manages many of the details that make the club experience great. The secretary works closely with the president and board of directors and is responsible for the management of all club records. As an officer of the club and a member of the board of directors, the club secretary can participate in all board discussions and vote on any question put to vote by the presiding officer. Club secretaries will find a list of resources at kiwanis.org/leadershipguide.

SKILLS

- Willingness to learn necessary technology and use Kiwanis online reporting systems.
- Ability to discern and summarize action items and key points from meetings.
- Organized.
- Deadline-driven.
- Effective communicator.

DUTIES

- Manage and maintain club and membership records online.
- Maintain club's permanent files.
- Keep minutes of club and board meetings.
- Act as official contact for all club mail correspondence.
- Collect all communications and distribute as appropriate.
- Submit all official reports required by Kiwanis International, the district and the club.
- Perform other duties as may be assigned by the president or board.
- Fulfill all other duties documented in the Standard Form for Club Bylaws.

REVIEW

1. Put a star next to the responsibilities and duties your club is doing well.
2. Circle the responsibilities and duties your club is not currently doing.

If you are struggling with any of the outlined duties, please reference kiwanis.org/leadershipguide.

FILES TO BE MAINTAINED BY THE SECRETARY

- All correspondence
- Convention information for the district and Kiwanis International
- Service Leadership Programs documents and communications

REVIEW

Where are these files located?

Who else has access to them?

PERMANENT FILES TO BE MAINTAINED BY THE SECRETARY

These files contain records to be passed on to the succeeding secretary or the custodian of the club's permanent records.

- | | | |
|--|---|---|
| <ul style="list-style-type: none"> • Board meeting minutes • Canceled checks (seven years) • Club newsletters • Club meeting minutes • Financial records and reports • Background checks of Kiwanis advisors (seven years) • Historic information and materials | <ul style="list-style-type: none"> • Invoices • Recognitions such as: <ul style="list-style-type: none"> ◆ Legion of Honor ◆ Ruby K ◆ Life member ◆ Significant donations • Lists of officers, directors and committees for each year | <ul style="list-style-type: none"> • Official documents related to club organization and incorporation • Official documents related to club foundation, if applicable • Other items of historical significance |
|--|---|---|

Kiwanis International's online reporting system tracks many permanent records for your club, but this system has just been introduced in recent years. Be sure you have the last seven years of records in your files either electronically or in print.

- | | |
|--|---|
| <ul style="list-style-type: none"> • Annual club reports of past years • Club bylaws • Former members' entry and deletion dates • Life Member Status recipients • Membership payment of fees and dues | <ul style="list-style-type: none"> • Membership: current roster and biographical information • Membership records for current members (Kiwanis International forms) • Annual billing reports |
|--|---|

Kiwanis online reporting

The online reporting platform allows club secretaries to streamline administrative tasks for the club, district and Kiwanis International. Here are some of the benefits of using it.

- Submit nearly everything directly from your computer — no paper forms to mail, no postage to purchase.
- Add and save information for the monthly report as it occurs.
- Submit your monthly and annual reports easily.
- Edit information in prior months' reports easily.
- Look back at previous reports at any time.
- Compile monthly reports into a comprehensive year-end report.
- Automatically send reports to club leaders, your district leadership team, Kiwanis International and others you include on your email list.
- Update your club roster in real time by adding new members, deleting members and updating current member information. Data is synced with Kiwanis International's records.
- Give districts access to up-to-date information about club membership trends, websites, and meeting time, days and locations.
- Submit your club's voting delegates for Kiwanis International convention.
- Update club meeting time and location as well as signature project information that's shared with potential new members via the Find a Club locator map on Kiwanis.org and in the printed annual directory.
- Report your club elections results to immediately give those members access to resources.
- See your club's Service Leadership Programs, their current status, and the confirmation that background checks have been completed for those members involved with those programs.

Certain areas of online reporting are currently available in English, French, Dutch, Norwegian, Icelandic, Japanese, Mandarin, and Spanish and are being used in North America, Australia, New Zealand-South Pacific, Philippine Luzon and Malaysia.

THINK ABOUT IT

Are you consistently completing or submitting your monthly club report?

DID YOU KNOW?

The information in your report is accessible to your governor and lieutenant governor.

Club bylaws

The Standard Form for Club Bylaws is submitted online by the club secretary or club president. Everything is listed in step-by-step instructions in case you forget anything on kiwanis.org/leadershipguide.

To access the club bylaws, log in to Kiwanis club management or go through the Kiwanis website at kiwanis.org/login.

Read the “Bylaws and policies” FAQ document found at kiwanis.org/clubbylaws to find the answers to common questions regarding the process before you get started. A PDF copy of the bylaws and policies template has been provided for review and discussion by your club — but note that all submissions should be made through the online Club Bylaws Management Center. As you proceed through the steps online, feel free to edit, save and return to the form as needed. Once all updates have been made as directed by club membership, complete and submit the online form.

DID YOU KNOW?

The PDF document “Blank bylaws and policies template” is a resource to help determine which variables best suit your club. Submit the final club-approved bylaws using the online form.

THINK ABOUT IT

When did your club last review its bylaws?



Staying organized

Although some things are considered optional or recommended, a few documents are required by either Kiwanis International or your local government to protect your club charter.

REQUIRED FORMS

Monthly report form	Complete by the 10th of every month (i.e., October monthly report due on November 10).
Membership reporting for annual dues billing	Update your roster throughout the year, adding and deleting members as necessary. Clubs are given until October 10 to delete any members for which they should not be billed annual dues. Check your roster for updates on club member contact information quarterly.
990, 990-N or 990-EZ form (U.S. clubs only)	File with the IRS by February 15. The 990 form allows your club to maintain its tax-exempt status. Get instructions and links at kiwanis.org/form990 .
Annual report of club elections	Submit to the Kiwanis International Office electronically using the Secretary Dashboard by June 1.

OPTIONAL FORMS

Proposed amendments and resolutions to the Kiwanis International Bylaws	Submit your proposal in writing to the Kiwanis International Office by October 31 for consideration in the House of Delegates.
Delegate certification forms	File a certification form by April 30 for delegates attending the Kiwanis International convention. Delegate certification forms for your district convention also have deadlines. Check with your district leaders or the district website.

IMPORTANT DUE DATES

10th of every month	Monthly club report due to the Kiwanis International.
October 1	Your first day in office.
October 1	Approval of club budget due.
October 10	Updated club roster due.
October 31	Deadline for any club to submit proposed amendments and resolutions to the Kiwanis International Bylaws to be presented at the next Kiwanis International convention.
February 15	Deadline for U.S. clubs to submit the 990-tax form to the IRS.
April 30	Delegate certification form for the next Kiwanis International convention due.
June 1	Annual report of club election due.

MONTHLY CHECKLIST

The months before you take office are a good time to get acclimated to your new role. During this time, work in conjunction with the current club secretary to ensure a smooth transition. Also consult the monthly task list at kiwanis.org/leadershipguide.

NOTES



TREASURER

TREASURER

Your election as treasurer of your Kiwanis club is proof that your fellow members see you as a person of integrity — with an aptitude for finance. Along with the club board, you are responsible for your club’s solvency and financial stability. Take pride in your leadership role. You’ve earned your club’s trust.

RESPONSIBILITIES

- The treasurer works with the club secretary to coordinate the club’s financial responsibilities and records. The treasurer often serves as an advisor to the club on financial matters, such as setting the club budget.
- A Kiwanis club’s treasurer is an officer of the club and a member of its board of directors, entitled to participate in all board discussions and eligible to vote on any question put to vote by the presiding officer.
- The treasurer is responsible for collecting all funds due to the club and for keeping the records of membership fees and dues, unless these responsibilities are delegated to the secretary. Club treasurers will find a list of resources at kiwanis.org/leadertools.

SKILLS

- Knowledgeable about bookkeeping and accounting.
- Attentive to detail.
- Organized.
- Willingness to learn and use appropriate technology.
- Ability to hold others accountable.
- Deadline-driven.

DUTIES

- Guide the board in preparing an annual budget before the start of the fiscal year.
- Coordinate the collection and disbursement of money.
- Receive and promptly deposit all funds paid to the club.
- Disburse funds as directed by the club board.
- Maintain the club’s financial accounts and records.
- Reconcile cash accounts on a monthly basis.
- Prepare and disburse bills to members.
- Provide a monthly financial report to the board.
- Compile an annual financial summary of income and expenditures for the annual club meeting.
- Make club records available upon request.
- Analyze return on investment from fundraising efforts.
- Perform other duties as assigned by the president or board.
- Fulfill all other duties documented in the Standard Form for Club Bylaws.

REVIEW

1. Put a star next to the responsibilities and duties your club is doing well.
2. Circle the responsibilities and duties your club is not currently doing.

If you are struggling with any of the outlined duties, please reference kiwanis.org/leadershipguide.

Member dues

Members of local Kiwanis clubs pay membership dues and fees to their club. The dues and fees paid by members support Kiwanis International, the Kiwanis district and the Kiwanis club.

The total amount a member pays in dues depends entirely on his or her club and district and is determined by the appropriate governing body. For district dues, this decision is made by the district House of Delegates. For club dues, the club bylaws and policies state that club membership dues, fees and other assessments, as provided in club policy, must be approved by two-thirds (2/3) vote of the members present and voting, provided at least fourteen (14) days' previous notice of the vote and proposed amount is given to the members. (Club Bylaws, Article 8.5)

Some clubs may include meal costs in their fees, while others may set lower dues and leave meals up to the individual member when attending a meeting or event. Dues and fees collected for club treasuries should be accounted for in the club's administrative account.

REVIEW

What do your dues cover?

Kiwanis International dues are set by the House of Delegates while the fees are established by the Kiwanis International Board based on the cost of the service provided.* The fees can fluctuate slightly to reflect the change in the cost. You do not have to charge the same amount to all of your members as long as it is indicated in your club's bylaws. Discounted club dues for senior memberships or for opting out of prepaid meals are popular options for many clubs.

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

More information on Kiwanis International and district dues can be found at kiwanis.org/dues and kiwanis.org/districtdues.

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.

*Depending on your country's GDP and location, Kiwanis International dues and fees may be adjusted.

REVIEW

1. What are the operating costs associated with your club?

2. Do your club dues cover all of these costs?

DUES TOTAL

Club dues	\$
District dues	\$
Kiwanis International dues	\$
Total annual dues	\$

For North American clubs only: 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 dues and fees mentioned above and then distributes them appropriately.

Some divisions request a voluntary contribution to either the division or the lieutenant governor.

Exceptions to the amounts above include:

- 1. Spousal waiver for the magazine.** While it is a condition of membership that each member is a subscriber to the official publication of Kiwanis International, if both spouses are members of a club (not necessarily the same club), one spouse may choose not to subscribe, which results in a reduction in fees. To receive this benefit, either the spouse or the club secretary can email memberservices@kiwanis.org to have this credit applied to their member record.
- 2. New-member alumnus of a Kiwanis SLP.** If a new member is an alumnus of a Service Leadership Program, the club should not charge that member for Kiwanis International dues for two years after joining **their first** club. They are still required to pay for the insurance and magazine fees, as well as the new member add fee. If the new member is reported properly when added to the club roster by the club secretary, this two-year waiver will automatically appear on the club invoice. Check with your district office to see whether your district waives district dues for new members who are alumni of SLPs. Contact memberservices@kiwanis.org if the alumni credit is not showing properly on the club invoice.

All exceptions are intended to be financial benefits to the eligible member and should be reflected on their personal invoices.

THINK ABOUT IT

Why is Kiwanis worth the cost?

Dues invoicing process

As with most things related to finance and accounting, there are clear expectations and deadlines regarding the completion of steps in the dues-invoice process.

Here are some facts and tips about invoice timing:

1. Ensure all your new member adds have been completed by the club secretary prior to September 30.
2. Work with the club secretary to review the current club roster and make any member deletions by October 10.
3. Your club invoice is created on or after October 10. The 10-day window between September 30 and October 10 allows the club secretary to update the roster accordingly. Once that window of opportunity has closed, your club invoice will be set.
4. Club invoices mail the last week October/first week of November, and they are due within 30 days. This date is indicated on the invoice.
5. U.S. clubs can pay online if that method is preferred. Clubs located outside the United States or those that would rather not pay online can pay according to the invoice instructions.

The president, secretary, assistant secretary and treasurer all have access to the finance tab after logging in at kiwanis.org. Only the secretary, assistant secretary and president can adjust the member roster. The assistant secretary's access is limited to one person. If your club has a separate treasurer and secretary, it may be a good idea to establish the club treasurer as the assistant secretary so that he or she can manage the financial obligations of the club using the online system.

For North American clubs only: 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 for those clubs when applicable. To simplify the payment process for clubs, Kiwanis International collects all of the dues and fees mentioned above and then distributes them appropriately.

NOTE

Sponsored Builders Club and K-Kids renewal fees will be billed to your club.

THINK ABOUT IT

What are ways to collect dues on time?

DIPLOMATIC DUES COLLECTION

Kiwanis International strongly suggests that members' payment of dues be scheduled for payment to the club by October 1. While dues are not paid by the club to Kiwanis International until late November or December, the October 1 deadline for members will help clubs deal with any changes to the club roster while it can still make adjustments without financial penalty.

Some clubs choose to bill members monthly, quarterly or semi-annually, especially for any required club fees like meal costs, to ease the financial burden on the member. Member billing is the club's decision — but the club's payment to Kiwanis International is due all at one time, so plan ahead to ensure your cash flow.

Important note: The club determined the definition of a "member in good standing" when it set its bylaws and policies. This definition the club to define whether there is a certain amount of money or time that a member can be in arrears on dues or fees before they are no longer considered in good standing.

Refer to your club bylaws and policies for these requirements.

MEMBER STATEMENTS

It has become standard practice to send an invoice attached to an email. If your members respond well to that delivery method, it can be a cost-saving way to avoid postage and can be more subtle and convenient than trying to hand-deliver invoices at a club meeting.

However, your membership chair or service committee chair may consider the invoice an opportunity to talk about the great work the club accomplished in the last year and how members made a difference...and then to say, "By the way, here's the invoice for this year."

It's a subtle difference, but there's an important distinction: You are not asking members to consider renewing their membership (and thus to consider *not* renewing). You are inviting them to continue to invest in the community by continuing their involvement with your Kiwanis club.

The key information for the invoice is fairly standard. But here's a checklist to make sure you include the important details:

1. Total amount due prominently displayed.
2. Where to remit payment.
3. To whom to make the check payable, if applicable (this should be the club name).
4. An outline of the dues and fees, including any discounts the member is eligible to receive.
5. A statement at the bottom indicating that the dues and fees are not considered a tax-deductible expense.

PAYING DUES ONLINE

Some clubs have the option of paying dues through district websites and resources. Contact your district secretary to find out whether this is an option for your club.

TIP

While most clubs assign board members to contact delinquent dues payers, you will find it is more effective to ask their member sponsor to reach out.

Club accounts

While some clubs may have the need for several separate accounts, every club has a minimum of two: the administrative account and the service account.

The administrative account is for all administrative expenses of the club. The majority of these funds comes from annual club dues, meeting meals (if applicable) and membership fees from new members. Generally, money from any activity in which only members participate is deposited into the administrative account.

ADMINISTRATIVE ACCOUNTS	
Receive income from	Cover the expenses for
<ul style="list-style-type: none"> • Dues. • Membership fees. • Meals (if applicable). • Assessments. 	<ul style="list-style-type: none"> • Kiwanis International and district dues. • Kiwanis International and district conventions. • Magazine subscriptions (if applicable). • Meals (if applicable). • Club newsletters (if applicable). • Club programming expense. • All or part of the expenses associated with liability insurance (if applicable).

The service account is for the service programs of the club. Basically, the income for this account is derived from fundraising projects in which the public participates or from designated contributions.

Article 8, Section 1, of the club bylaws stipulates: "Monies received for club service activities, regardless of source, may be used only for service activities." The service account covers expenses for all club service activities, as well as all educational, religious and charitable activities. The service account can also cover expenses associated with sponsorship of a Kiwanis Service Leadership Program (SLP) for youth, adults with disabilities or university students. Income from some members-only fundraisers that are designated by the board as service fundraising projects may also go into the service account.

SERVICE ACCOUNTS	
Receive income from	Cover expenses for
<ul style="list-style-type: none"> • Fundraising projects in which the public participates (may be net of expenses). • Members-only fundraising projects that are designated by the board as service fundraising projects. <p>REMEMBER Income from fundraising projects in which the public participates MUST go into the service account.</p>	<ul style="list-style-type: none"> • Club service activities. • Charitable, educational and religious activities of the club. • Expenses associated with sponsorship of a Kiwanis Service Leadership Program. • All or part of the expenses associated with liability insurance (if applicable). • Club leadership education, district education events and the Kiwanis Education conference.

DID YOU KNOW?

Clubs can pay all or a portion of each member's expenses for the Kiwanis Education Conference — part of the Kiwanis International convention — from its service account. A fair practice would be to reimburse two-thirds from the service account and one-third from the administrative account for a member attending all three days. Expenses for only attending the Kiwanis Annual Meeting would not qualify for reimbursement from the service account by Kiwanis standards.

ACCOUNTING SYSTEM

Accounting systems will differ, depending upon services and equipment available to the treasurer.

When you develop your club accounting system, be sure that you can:

- Identify all sources of income.
- Identify all disbursements.
- Create accurate financial reports.
- Permit the accurate billing of members.
- Report the financial standing of each member at any time.
- Provide the secretary with data to prepare a statement of delinquent members for the president or board. (Such information is strictly confidential.)

Kiwanis International has established a relationship with Aplos, a preferred vendor that specializes in not-for-profit accounting software. For more information, visit kiwanis.org/leadershipguide and click “Kiwanis club treasurer software.”

ANNUAL AUDIT

The bylaws of every club require an annual audit of club accounts, which can be completed by either a qualified accounting firm not affiliated with any club member or a standing financial review committee. Every club is required to have an annual financial review by either an independent auditor or an

internal committee. Making the annual audit a standard practice ensures that club finances are handled properly — and it reinforces the club’s confidence in the treasurer.

Should the club choose to have the annual audit performed by an internal committee, the treasurer can be a resource to the committee but should not serve on the committee. This would be a conflict of interest and would infringe on the independent nature of the audit.

REMEMBER

- The audit is required by the bylaws of every club.
- The audit may be completed by the club’s financial review committee or a qualified accounting firm.
- If your club chooses to have the audit completed by a financial review committee, the treasurer **cannot** serve on the committee.

INCORPORATION

Some countries require incorporation at the time of new club chartering. Please check with your governing body to determine whether you are required to incorporate.

REVIEW

Who holds onto the permanent records in your club? Circle one.

- Club secretary
- Custodian of records

Contact information of permanent record keeper:



Budget process

As the incoming treasurer, you will work with the incoming club president and other leaders of the club to develop the annual budget for the administrative year. This budget should include all anticipated committee expenses and projected revenue from fundraising activities.

FILES TO BE MAINTAINED BY THE TREASURER

- Club checkbook.
- Paid invoices file.
- Cash receipts file (deposit records).
- Bank statements and reconciliations.
- Treasurers reports.
- Budget files.
- Official documentation required by state or local law.

PERMANENT RECORDS TO BE MAINTAINED BY THE TREASURER

At the end of the fiscal year, you'll need to pass along these files to the club secretary or the custodian of the club's permanent records.

- Canceled checks (seven years).
- Financial records and reports.
- Invoices.
- Official documents related to the club foundation, if applicable.

THINK ABOUT IT

What is important to your club?

Your budget should reflect what's most important to your club. Proper funding is necessary for successful fundraising events. Consider creating partnerships, offering sponsorship opportunities or applying for grants.

During August, committees should meet to review materials, goals and timelines. They'll form project schedules and submit a budget proposal for the club board's consideration before the end of September (or at the first board meeting in October). It's best if the budget can be approved in advance of the new administrative year, but the approval should come from the board that will be serving in that administrative year. If your club doesn't allow the incoming board to vote on issues prior to October 1, the first board meeting of the new administration is the appropriate time to vote on the budget.

REVIEW

What are three things you should include in your budget?

1.

2.

3.

REPORTING EXPECTATIONS

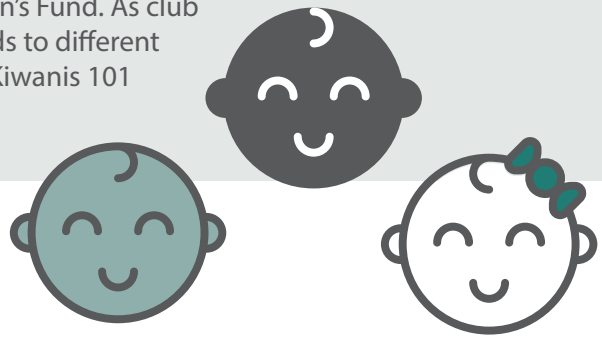
Each time the board gathers to discuss the business of the club, the treasurer should be prepared with a financial report indicating the activity in both the administrative and the service account as compared to the budget. This typically includes the month just completed and the administrative year-to-date.

In addition, the club's annual meeting takes place in either April or May. (Information is provided in the club president resources.) One item on the agenda is a report from the treasurer. This annual report to the membership should include detailed financial information, such as the financial statements from the most recent board meeting. This is a great opportunity to talk about the amazing work the club is doing that is evident in the financial statements (e.g., scholarship awards, fundraiser revenue, donations to a local cause, etc.).

Be transparent about all financial records and current financial status with your club at all times.

Support the Kiwanis Children's Fund!

Invest in your Kiwanis passion with the Kiwanis Children's Fund. As club treasurer, you can encourage your club to allocate funds to different causes supported by the Children's Fund. Refer to the Kiwanis 101 section for more information.



NOTES

How the Kiwanis Children’s Fund supports you

CLUB GRANTS

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.

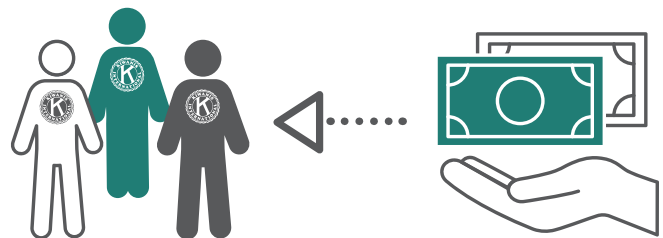
For the Children’s Fund, a grant is a form of collaboration. When a Kiwanis club has a gap in its funding for a service project, a club grant can help fill it.

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 at kiwanischildrensfund.org/clubgrants.

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 Kiwanis cause areas (health and nutrition, education and literacy or youth leadership development).



Visit 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. You also can call 1-800-KIWANIS, ext. 225 (U.S. and Canada), or +1-317-217-6225 (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.

THINK ABOUT IT

How could you improve your community through service if you received a grant from the Kiwanis Children’s Fund?

For U.S. clubs only

INCORPORATION

Each club in the United States is required to be incorporated. Incorporation is typically completed at the time of new-club chartering. However, it's important to ensure that your club's paperwork has been filed.

Check in your club files for a copy of the original paperwork. Kiwanis International and your state or local government agency will need a copy of these files. Be aware that incorporation must be renewed annually or according to your incorporation laws.

For additional information, call Kiwanis member services at 1-800-KIWANIS, or +1-317-875-8755, ext. 411.

U.S. REVENUE ACT REGARDING FUNDRAISING SOLICITATIONS

United States federal legislation requires that any fundraising solicitation by or on behalf of Kiwanis clubs and Kiwanis districts must include an express statement that "contributions or gifts to the club are not deductible as charitable contributions for federal income tax purposes." On all solicitations, the statement must be in a conspicuous and easily recognizable format, whether the solicitation is made in written or printed form, by television or radio, or by telephone.

990 TAX FORM

The IRS requires that all U.S.-based Kiwanis clubs submit a 990 form annually. Not filing this form in a timely manner may put your club's incorporation status at risk, resulting in the loss of its 501(c)4 tax-exempt status. This form is due February 15, assuming a fiscal year end of September 30.

Kiwanis International has established a relationship with a preferred vendor that specializes in not-for-profit accounting software that includes a simple method for submitting your 990 form.

For more information, visit kiwanis.org/form990.

REMEMBER

- Report club finances promptly each month.
- Maintain separate reporting for administrative and service accounts.
- Reconcile bank accounts monthly.
- Give receipts for funds received.
- Require an invoice or a check request for checks written.
- Act as cashier at meetings (when needed).
- Provide records for annual audit.
- Retain records for seven years.

NOTES



NEED HELP?

The following IRS website provides more information: irs.gov/charities-non-profits/electronically-submit-your-form-8976-notice-of-intent-to-operate-under-section-501c4.

You may also contact your Kiwanis district office or email Kiwanis International at finance@kiwanis.org.

IRS REQUIREMENT FOR SECTION 501(C)(4) ORGANIZATIONS — FORM 8976

The IRS has recently passed a new regulation requiring all newly-formed 501(c)(4) organizations to notify the IRS of their intention to operate as a 501(c)(4) by filing Form 8976, as stated in Internal Revenue Code 26 CFR 1.506.

Currently, almost all Kiwanis clubs in the United States operate as 501(c)(4) organizations under the Internal Revenue Code. To be considered a 501(c)(4) organization, the club must report its Employer Identification Number, or EIN, to Kiwanis International, which then reports it to the IRS as part of its annual Group Exemption Number filing (GEN 0026).

Because of this current practice, Kiwanis International asked for clarification from the IRS as to whether new Kiwanis Clubs are required to file Form 8976. On September 29, 2016, Kiwanis International was notified by the IRS through our tax advisor (BKD LLP) that all new Kiwanis clubs need to file Form 8976 and that it does not matter that the club is part of a group exemption.

DO I NEED TO FILE FORM 8976?

Did your club file tax documents (such as Form 990-N, Form 990-EZ or Form 990 or Form 1024) with the IRS prior to July 8, 2016?

Yes: You do NOT need to file Form 8976.

No: YOU NEED TO FILE Form 8976. This form is an electronic form. See the next page for details.

WHEN DO I NEED TO FILE FORM 8976?

If you answered NO to the question at left and your Kiwanis club was organized prior to July 8, 2016, you are required to file Form 8976 immediately. Please file as soon as possible, since failure to file Form 8976 may result in fines.

All new clubs organized on or after July 8, 2016, must file Form 8976 within 60 days of its organization date or the date of your EIN notification letter from the IRS.

HOW DO I FILE FORM 8976?

Form 8976 and a \$50 filing fee must be submitted online at services.irs.gov/registration.

To complete the electronic Form 8976, you will need to set up an electronic account with an email address, login ID and password. You will also need the following information about your Kiwanis club:

1. Business name (usually written as “the Kiwanis Club of _____”).
2. Address.
3. Employer Identification Number (EIN). If you do not already have this number, you must obtain it by filing Form SS-4 with the IRS before you can file Form 8976. See NOTE at right.
4. Date the club is organized or date of official EIN notification letter from the IRS.
5. State and country where your club was organized.
6. Filing year/month. This is the month your club’s accounting period ends. For most Kiwanis clubs this would be September.
7. Statement of purpose of the club. This is usually a statement declaring whether the club wishes to operate as a social welfare organization, which is the classification of a Kiwanis club with the IRS.

NOTE

All Kiwanis clubs are required to send their EIN to Kiwanis International, c/o Finance Department, 3636 Woodview Trace, Indianapolis, IN 46268. Upon receipt, it will be reported to the IRS so the club can be included in the 501(c)(4) Group Exemption filing.

The IRS will automatically supply a confirmation when you submit the required information. Maintain the confirmation for your records.

Please note that this is a one-time filing for new clubs.

NOTES



MEMBERSHIP CHAIR

MEMBERSHIP CHAIR

You were appointed to chair your club's membership committee by your club's president to ensure support for your club and to help it thrive in your community. As chair of the membership committee, your goal is to create a club membership experience that's rewarding for current members and inviting to others.

RESPONSIBILITIES

You will work with everyone in your club to make their experience enjoyable and attractive to prospective members. You are the face and voice for membership activities in your club.

SKILLS

- Ability to demonstrate and encourage a positive attitude.
- Aptitude for building an inclusive environment.
- Relationship-building.
- Team-building.
- Confidence as a public speaker.
- Adaptability.

CHAIR DUTIES

- Meet regularly with committee members and prospective members.
- Set realistic and measurable goals with the committee members and in consultation with the club's board of directors.
- With committee members, develop an action plan for meeting goals, which are then approved by the club's board of directors.
- Conduct the member satisfaction survey and community survey annually.
- Provide regular reports to the club board.
- Clearly communicate the importance of membership efforts to club members.
- Teach others how to invite community members to club events.
- Ensure new members are reported, inducted and oriented promptly.
- Understand the value of hybrid and flexible membership and meeting opportunities.

COMMITTEE DUTIES

- Plan membership drives and special member events.
- Ensure new members are immediately involved in club activities.
- Execute membership action plan.
- Encourage club members to invite others to meetings and service projects.
- Plan and execute a fun and informative new member orientation program.

REVIEW

1. Put a star next to the responsibilities and duties your club is doing well.

2. Circle the responsibilities and duties your club is not currently doing.

If you are struggling with any of the outlined duties, please reference [kiwanis.org/leadershipguide](https://www.kiwanis.org/leadershipguide).

Inviting new members

ESTABLISHING GOALS

Your club president and club board, along with the lieutenant governor, will talk about your club goals. That includes membership. Your membership goals should be determined by the number of people your club wants to reach. Based on that desired impact, set achievable goals — and then celebrate accomplishments.

Kiwanis International honors clubs that have strengthened their membership. Take advantage of the recognition and awards that are available and use them to motivate club members. More information is in the resources section of this guide and at [kiwanis.org/membership](https://www.kiwanis.org/membership).



MAKING YOUR INVITATION PERSONAL

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

- Create relationships, rapport and referrals within the community.
- Discover community goals and needs.
- Invite the people you meet to support Kiwanis.
- Invite the people you meet to join as a member.

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

- Remember that the meeting is about the guest.
- Look the person in the eye and firmly shake hands (or greet and give your full attention in a virtual environment).
- Show you're genuinely happy to meet him or her.
- Show interest — ask questions and actively listen.
- Mirror the other person's body language. For example, if he or she leans forward, do the same.

Introduce Kiwanis (simply).

- Have fun.
- Tell stories.
- Connect on a personal level.
- Introduce them to other club members.
- Avoid Kiwanis jargon and acronyms.

THINK ABOUT IT

How many members do you hope to add to your club this year?

How were you originally invited to join Kiwanis?

Flexible memberships

CLUB SATELLITE MEMBERS

How it works:

- Both groups establish the guidelines of the relationship, with someone from both groups serving as liaisons with the other.
- The host club's board authorizes service and fundraising activities and maintains financial oversight.
- By retaining affiliation with the parent club, members of a satellite remain focused on service rather than administrative concerns — making it a great option for busy lifestyles.
- Satellite members enjoy the benefits of Kiwanis, including elected positions, attendance at conventions, Kiwanis magazine and insurance coverage.
- If a satellite group reaches 15 members or more, it can consider petitioning for its own charter.

CORPORATE MEMBERSHIPS

How it works:

- The organization joins the club as a member, following the usual process.
- The company is represented at meetings and events by a designated employee.
- If the designated employee changes jobs, a new employee can be designated to take his or her place without being charged a new member fee.
- This option is also ideal for nonprofit entities that have an interest in helping children and bettering the community.

REVIEW

List 3-5 companies that might be good candidates for corporate memberships:

SERVICE LEADERSHIP PROGRAMS ALUMNI

As Key Club and Circle K International members graduate, Kiwanis has made it as simple as possible for these Kiwanis family members to join your club. As alumni joining **their first** Kiwanis club, they receive:

- A waiver of the Kiwanis International new-member fee or charter member fee.
- A two-year waiver of Kiwanis International dues. (Ask district leaders whether your district offers any alumni dues waivers.)

These waivers encourage alumni to stay involved with the organization they already know so well. They can be recent or well-seasoned alumni — there's no age limit to benefit from the opportunity. The waivers are available only to new Kiwanis club members.

REVIEW

Are you using the Service Leadership Programs dues waiver as a recruitment tool?

Other ways of reaching out

GUEST CONTESTS

A good competition can inspire great action. Some clubs have created teams and “competed” against each other. Others made it a contest for individual recognition. But the best results come from something that can be tracked and easily displayed. Reward members who invite people to club activities as well as those who sponsor new members.

SPECIAL GUEST DAYS

Identify an upcoming meeting or service project that reflects what’s important to your club — and highlights the best of what you do. Intentionally make the effort to invite potential members to experience what Kiwanis is all about.

LEADS FROM “FIND A CLUB”

Did you know that the “Find a club” locator map on kiwanis.org garners about 5,000 queries every year from around the world? If you receive one of these queries by email, follow up right away. This person is looking for a group like your club to be a part of.

ROSTER ANALYSIS

When looking for new members, consider your current club roster. By completing a roster analysis, your committee can identify occupations and skill sets that aren’t represented in your current roster and develop a prospect list. A worksheet is available at kiwanis.org/clubstrengthening.

SOCIAL MEDIA

Advertising on social media can attract attention to Kiwanis clubs. But attention doesn’t always equal membership growth. A person who expresses interest in Kiwanis needs to be guided into membership. Potential members, partners and donors are fact-finding — and deciding whether your club is worth their personal investment. They’ll send comments and questions to your Facebook page and will expect an answer almost instantaneously. Respond immediately, and provide the information they’re seeking. Don’t just refer them to another source: Help them make sense of your club, its projects and its contributions to the community.

REVIEW

How does your club typically get new members?

Brainstorm new ways you could add new members to your club.

What strategies and resources are available for inviting new members into your club?

Engaging and retaining members

NEW MEMBER ORIENTATION

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

It's best to begin new member orientation before a prospective member joins so they understand the vision of the club and the responsibilities of membership — but it needs to be completed within two weeks after officially joining. Orientation is an opportunity to help new members understand your Kiwanis club. And it's a way for your club to learn about their interests and skills.

An orientation guide is available to download at kiwanis.org/newmemberorientation. Be sure to customize this resource so it reflects your club and its traditions.

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 interacting with everyone. Their mentors may be their sponsors or someone they just met. Mentors can help new members connect their interests with club activities.

REVIEW

Which members may be great mentors?

NEW-MEMBER INVOLVEMENT

Once a new member is ready, it's time to get that person involved.

- **Show them they're needed.** Assigning new members to committees can help engage their talents and interests. And by giving them a simple task connected to a meeting or project, they'll immediately feel like part of the team.
- **Expand their Kiwanis networking connections.** Consider taking a new member to visit a nearby club's meeting or participate in their service project. Invite them to attend a division council meeting so they can meet more Kiwanians in their area. Make them feel comfortable — so they are more likely to attend a district or international convention.
- **Ask for their feedback.** After new members are inducted, consider asking some of them to meet

casually with board members. A new person's input can provide a different perspective:

- ♦ What has the club done to make you feel welcomed?
- ♦ What made you decide to join a Kiwanis club?
- ♦ Was there anything that someone said or showed you that made you feel good about joining?
- ♦ What are you most excited about doing with your club?
- ♦ What are the ways in which you are passionate about serving your community?

REVIEW

How do you engage your new members early on?

EXISTING MEMBERS

Kiwanis clubs often lose people who don't feel engaged in club activities. Make an effort to find out why — and to re-engage them.

- Review the club roster to identify members who have become inactive.
- Assign club members to contact “missing” members.
- Contact members by phone or with a personal visit to tell them what's happening and invite them to the next event.
- Conduct a fun meeting to celebrate the club's members and accomplishments.

Sometimes you can feel the lack of energy when you walk into the room. If this describes your club, it's time to find out why. Start by surveying your members with the **Measuring member satisfaction*** tool. This is a simple way to give members a voice — and to give club leaders the information they need to make meaningful change.

TIP

If a member hasn't paid their dues, participated in a service project or attended a meeting during the first quarter, you need to find a way to get them re-engaged.

REVIEW

What strategies and resources are available for retaining current members?



* One of several Achieving Club Excellence tools available online at kiwanis.org/acetools

CLUB MEETINGS

In most circumstances, the club meeting is the most frequent opportunity to connect with fellow members. So let's make club meetings awesome. Here are some tips:

- **Always start and end on time.** People depend on it.
- **Provide an agenda.** Meetings don't have to be routine, but knowing what to expect is helpful for the busy member.
- **Include some fun.** It's OK to be less formal as long as everyone is having a good time.
- **Include some service.** Consider performing a service project during your club meeting time.
- **Make it matter.** Ensure club meeting topics are relevant to your members and reflect well on the culture the club is trying to create.
- **Make it relevant.** Keep meetings member-focused.

When possible, invite members of your club's sponsored Service Leadership Program(s) to attend a meeting.

ANNUAL AND OCCASIONAL ASSESSMENTS

An important part of the membership committee's role is to work with the club board to conduct regular assessments. Get input from club members, board members and community leaders. Then use that input to:

- Analyze your impact on the community.
- Find unmet needs in your area.
- Develop a signature service project or fundraiser.
- Expand your club's partnerships.
- Improve the club members' experience.
- Create a detailed plan to achieve goals.
- Celebrate your accomplishments.

Achieving Club Excellence tools are available to guide you through assessments. You can find them at kiwanis.org/acetools.

RECOGNITION AND REWARDS

A club's ability to motivate and retain members depends on its ability to provide personal value with membership. For some, the benefit of a job well done is rewarding enough. For others, a little acknowledgment is important.

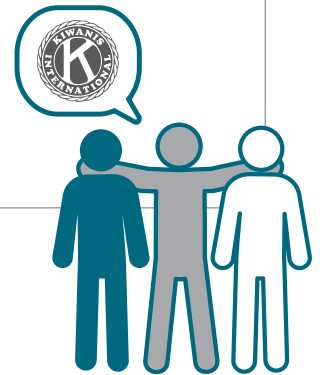
Here are some guidelines for recognition:

- **Share it.** Tell others how much you appreciate someone's contributions to the club, and how glad you are that he or she is a member. Consider creating a Kiwanis certificate of appreciation and presenting it during a meeting.
- **Shake it up.** Vary your approach. Write notes, say "thank you," provide spontaneous treats, or hold a formal dinner or awards ceremony.
- **Personalize it.** Knowing your members' interests will help you recognize them in a meaningful way.
- **Make it appropriate.** Match the level of gratitude to the effort or achievement.
- **Make it a priority.** Designate a member of your club to focus on consistent and frequent recognition, and encourage all members to consistently identify what others have done to make the club better.
- **Be consistent.** Regular recognition, such as a Member of the Year award, helps ensure that members' big-picture contributions to the club's success are recognized too.
- **Be timely.** Recognition has a greater impact when given soon after the member's contribution.
- **Be sincere.** When you recognize a member, take time to truly reflect on that person's value to the club.
- **Spread it.** Find ways to let your members' family know how much you appreciate their support and encouragement.

REVIEW

How do you recognize your members? Do you reward them for their dedication to Kiwanis?

Brainstorm ways you could improve your club's recognition and rewards.



Increasing the club's visibility

PUBLIC AWARENESS

Do the people in your community know about your club? Use the Public relations toolkit for club strengthening on kiwanis.org to let people know that your club is part of the community — and made up of people who live there.

Kiwanis communications resources include key messages, logos and images, news release templates and other media tools. Use them to spread the word about your club's service and fundraising. They're all available at kiwanis.org/brand.

BRANDING

An organization creates brand awareness through consistent use of the images and language associated with it. The same is true for your club and Kiwanis.

Feel free to liven up a sign or a shirt with some creativity — but keep the logo and wordmark true to their original design to protect the brand's consistency. If possible, make sure your podium has a properly branded sign with your club's logo so anyone taking photos can capture it.

And remember: When members proudly wear Kiwanis-branded shirts during club service projects and fundraising activities, that sends a strong message to the public — and creates great opportunities for photos that keep sending that message after the event.

REVIEW

Does your club have a custom logo similar to this example?



Kiwanis[®]
CLUB OF INVERNESS

Membership Chair Annual Checklist

PRIOR TO YOUR YEAR

- Work with club president to conduct a members' survey.
- Meet with the secretary to discuss why members left the past year.
- Meet with service chair to discuss number of additional members needed to achieve service goals.
- Meet with PR/Marketing chair to discuss plans for the upcoming chair.
- Recruit members for committee.
- Review new member orientation and making any adjustments or changes needed.
- Create a plan for the year in conjunction with your committee, based upon the goals and needs of the club.
- Present training to members on how to talk about Kiwanis to potential members – consult with the club president to make practice an ongoing event at meetings.
- Order membership application and club brochures.

THROUGHOUT THE KIWANIS YEAR

- All members are provided new member orientation – to be conducted prior to actual joining is preferred.
- Follow-up on all leads for new members.
- Do exit interviews with all members to determine why they are leaving the club.
- Work with club leadership to provide a strong Kiwanis experience for all members.

- Encourage all members to invite prospective members to club events.
- Keep all prospective member information in stock to share.
- Follow-up with members not attending, to determine how to keep them involved in the club.
- On-going recognition of member accomplishments and important life events.
- Send new member information and money to Kiwanis International immediately.
- Conduct induction ceremony for all new members.

OCTOBER-DECEMBER

- Provide Kiwanis education to all club members at a club meeting.
- Plan a social event over the holidays. Take the time to ensure members all know each other and feel a part of the club.
- Follow up after the event with Thank You notes to all who attended, include an invitation to join the club for an upcoming service event.

JANUARY-MARCH

- Work with your Service Leadership Program advisors to hold joint events with your program members and their parents or guardians. Use this celebration of partnership and support to also encourage others to join your club. This could be installations of officers, scholarship awards, or joint service projects.
- Continue to follow up with all people who have shown interest

in more club involvement.

- Take the opportunity on or around the Kiwanis birthday to plan a large fun, fellowship and recognition event to celebrate your members and their contribution to the community. Invite past members, supports and partners to celebrate the club's impact and successes.

APRIL-JUNE

- Work with your service chair to start planning for a large service project to use as a membership event.
- Get all members to recommend the names of people who would be good members for your club.
- Use the Hosting a Membership Event to plan the event.
- Prepare the club for the event.
- Follow up from event to ensure all interested parties join the club.
- Begin working with your successor so that they can be prepared for their year.

JULY-SEPTEMBER

- Make follow-up calls or have in-person conversations with people who have shown interest in the club to see if you can get them to join before the end of the year.
- Have in-person conversations with any members who may be thinking of dropping their membership to try to keep them involved.
- Conduct a membership contest amongst the membership to bring in more new members.



RESOURCES

RESOURCES

As a club leader, it's your job to keep your club healthy and your members engaged. Use these tools to recognize achievements, raise funds and maintain your club's good health. Find more helpful resources online at kiwanis.org.

AWARDS AND RECOGNITION PROGRAMS

Take time to celebrate contributions and achievements. It's a great way to let members know that you appreciate them — and it helps keep your club motivated throughout the year.

Club awards

Make running your club fun and rewarding by recognizing members' hard work and accomplishments. It's also thoughtful to share a small gift with guests and speakers. Find ideas for recognition and awards at kiwanis.org/recognition. Looking for items to give? Check out the selection of Kiwanis-branded items at the Kiwanis Family Store (kiwanis.org/store).

District awards

Your district will have a suite of awards and recognition opportunities for your club and its members. Look for them on your district website, at district and division conferences and in materials provided by your district office. Contact your district for details.

Kiwanis International awards

Your club and its members can earn recognition from Kiwanis International too. Some awards honor achievements, and others honor clubs and individuals for financial contributions. Visit the websites listed in each section to stay up to date on the latest recognition opportunities. There's almost always something new!



For members

- Life Member status.
- Legion of Honor (see description on next page).
- Ruby K pin (for inviting five or more new members).
- Distinguished member award.
- Kiwanis Children's Fund George F. Hixson Fellowship (for contribution of US\$1,000 to the Children's Fund).
- G. Harold Martin Fellow (for contribution of US\$250 to the Key Club Youth Opportunities Fund).
- Carthage-Pullman Society Fellow (for contribution of US\$250 to the Circle K Tomorrow Fund).
- Sapphire Circle Honorary Fellow (for contribution of US\$1,000 to the Circle K Tomorrow Fund).

For the club

- Sponsor banner patch (for Kiwanis Kids, Builders Club, Key Club, CKI or Aktion Club).
- Kiwanis Children's Fund banner patch (for Annual Club Gift).

Legion of Honor

With the Legion of Honor program, your club and Kiwanis International can recognize members who have accumulated a total of 25 or more years of membership (not necessarily without interruption) in one or more Kiwanis clubs.

Even a club organized within the past 25 years may have a member entitled to Legion of Honor recognition because of Kiwanis membership before joining the present club.

Legion of Honor lapel pin and/or certificates may be ordered from the Kiwanis Family Store. These items specify either “25 years” or some other multiple of five greater than 25 (e.g., 30, 35, 40, etc.). Consistency is key: Recognize Legion of Honor members in the same way each time an additional five years of service is accumulated.

INSURANCE

The Kiwanis International Comprehensive General Liability Insurance Program provides legal liability insurance for clubs, members and Service Leadership Programs 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.

This insurance covers clubs in the United States, Canada and the Caribbean. Clubs pay per member for this coverage, which is submitted with the payment of Kiwanis International dues. Clubs are authorized to allocate all premium charges, as an expense, from revenue of fundraising projects.

The provisions of the policy apply to most normal liability exposures of Kiwanis clubs. As with most insurance policies, there are exclusions, limitations

and restrictions. For a list of these exclusions, see the Club Insurance Resource Guide.

Kiwanis International strongly urges its member clubs not to conduct events that would involve: (1) the use or operation of a mechanical amusement device or ride owned or operated by a Kiwanis club or Kiwanis club member, or (2) the detonation of fireworks or explosive devices detonated directly by a Kiwanis club, Kiwanis club member or other named insured. This is a legal liability policy, and it does not provide medical payment benefits or any other voluntary payment coverages. However, Kiwanis International provides medical payment coverage on a self-insured basis.

More information is contained in the Club Insurance Resource Guide, which is sent to your club secretary annually. Or find it at kiwanis.org/liability.

NOTES

BRANDING AND PUBLIC AWARENESS

Your club is part of something big. Kiwanis is a global organization with clubs in more than 80 countries — and it’s a global brand that every Kiwanis club and every Kiwanis member shares. When you’re promoting your club in your community, be sure you’re using the most current Kiwanis International branding. That way, everything you do will also support your fellow Kiwanians and their clubs around the world. The more we share our brand, the more we can do for children in our own communities and around the world.

You can find resources to support your club’s public awareness efforts at kiwanis.org/awareness. Download logos at kiwanis.org/logos and our latest brand guide at kiwanis.org/brandguide.



KIWANIS INTERNATIONAL’S GOVERNING DOCUMENTS

Kiwanis International’s governing documents guide Kiwanis leaders at the club, division and district levels. They include the Kiwanis International Bylaws, Kiwanis International Board Policies and Procedures, the Standard Form for District Bylaws and the Standard Form for Club Bylaws.

The Kiwanis International Bylaws can only be amended by the House of Delegates at the Kiwanis International convention (though some provisions can be amended at a meeting of the Kiwanis International council). The Kiwanis International board can revise Policies and Procedures at any time. The Standard Forms for Club Bylaws and District Bylaws are generally revised only in accordance with amendments to the Kiwanis International Bylaws, though the board can revise them at any time, if deemed necessary.

The most current version of each document is available at kiwanis.org.

CLUB STATUS

“In good standing”

To be a club in good standing, a Kiwanis club must comply with the Essential Actions of a Kiwanis club as defined by the Kiwanis International board:

- A. Comply with all the provisions of the Bylaws and Policies and Procedures of Kiwanis International, its district and its federation (if any).
- B. Comply with the current Standard Form for Club Bylaws, modified as approved by the international board of trustees.
- C. Implement community-service projects, including those that support Young Children: Priority One.
- D. Sponsor or support a Kiwanis Kids program, Builders Club, Key Club, CKI club, Aktion Club or Kiwanis Junior club (where possible).
- E. Maintain an active, privileged and senior membership of not less than fifteen (15); set a goal of a net increase of at least one (1) member per year; and stage pre-induction orientation and formal induction of new members.
- F. Pay dues, subscriptions and other obligations to Kiwanis International, its district and its federation (if any), within ninety (90) days after such amounts are due.
- G. Meet at least twice monthly with a well-managed, informative and fun club meeting which contains an informative program and follows a timed agenda.
- H. Schedule board meetings at least once a month.
- I. Monies received from fundraising projects in which the public participates, or from members or others for the service activities

sponsored by the club, shall be segregated from the administrative funds and shall be used only for charitable, educational, religious and eleemosynary activities.

- J. Complete the annual club organization, including the election and reporting of officers and the appointment of committees.
- K. Have club officers participate in club leadership education.

- L. Participate in district and division activities, including the fulfillment of its club delegate obligation to district conventions.
- M. File all reports as required by Kiwanis International and by the district and federation (if any).

Clubs not current with financial obligations

A. Charter suspension

When a club fails to pay its international, district, or federation financial obligations exceeding US\$150 billed by and payable to Kiwanis International within ninety (90) days after such amounts are due, the club shall be considered not current with its financial obligations and placed on charter suspended status.

B. Club delegate representation prohibited

A club not current with its financial obligations or having outstanding dues obligations is not entitled to be represented by delegates at any district, federation (if any), or international conference or convention.

C. Written notice and status report

A notice of and reasons for not being current with its financial obligations will be sent no later than one hundred and twenty (120) days after the indebtedness is due to the last reported president and secretary of the club by the executive director or designee, and copies shall be sent to the district.

D. Charter revocation

When a club fails to pay its international, district or federation financial obligations to Kiwanis International within eight (8) months after such amounts are due, under the International Bylaws, the club charter shall be revoked at the next Kiwanis International board meeting. Whenever the Kiwanis International board shall direct revocation of a club charter for nonpayment of financial obligations, the club's last reported president and secretary shall be notified immediately of such action by the Executive Director or designee, and copies shall be sent to the district. The club's last reported president and secretary and the district shall be informed of the pending charter revocation two (2) months prior to the charter revocation date.

E. Return to "in good standing" status

If, at any point in this process prior to charter revocation, the club pays its full indebtedness, the club shall then be returned to "in good standing" status and shall be so notified by the Executive Director or designee.

Clubs at risk for low membership

A. Conditions and notice

Within thirty (30) days after the September 30 certified membership is released, the executive director or designee will notify each district of the clubs in their district whose September 30 certified membership is below fifteen (15). Such clubs will be considered at risk.

B. Assistance

During the period a club is deemed to be at risk, Kiwanis International and/or the district will provide membership development programs to assist the club in the process of increasing its membership to a level wherein the club can function fully and fulfill its responsibilities of a club as required in the Essential Actions.

REPORTS, VERIFICATIONS AND FORMS FOR THE ADMINISTRATIVE YEAR

Some reports and verifications that are to be filed by the president and/or secretary during the administrative year are listed below. For other helpful materials and ordering information, see the Kiwanis Family Store catalog at kiwanis.org/store.

REQUIRED

	DONE BY	PURPOSE	DUE
Annual report of club election	Secretary	To notify Kiwanis International and the district of club officers for the coming administrative year. Information will appear in the Kiwanis International directory.	June 1
Annual club report	President and Secretary	To report club activities and service for the year.	November 30
Membership information form	Secretary	To add, delete or transfer a member, to change member information, or to add a nonmember subscription to Kiwanis magazine. Available online at kiwanis.org . For information, go to kiwanis.org/reporting .	Submit to Kiwanis International immediately upon completion.
Club president/ secretary change notification	Secretary	Notification is made through the secretary dashboard.	Submit to Kiwanis International immediately upon change of president/ secretary information.
Federal Income Tax Report Form 990/990-N/990-EZ	Treasurer (U.S. clubs only)	Assistance is available from the local IRS center or the district Kiwanis office. The IRS has the authority to charge a penalty for failure to file or for filing late.	February 15

OTHER

	DONE BY	PURPOSE	DUE
Official monthly report	Secretary	To report administrative and service activities of the club during the month. For more information, go to kiwanis.org/reporting .	10th of every month
District convention delegate certification and registration	Attendees	To register convention attendance and reserve accommodations. Contact your district office with any questions.	Follow due date instructions on form.
Kiwanis International convention delegate certification	Attendee or Secretary	File a certification form to Kiwanis International by April 30 for delegates attending the Kiwanis International convention. Your club secretary can file this via their secretary dashboard, or a fillable PDF is available for download at kiwanis.org/convention .	April 30
Kiwanis International convention registration and housing	Attendees to convention	To register convention attendees and reserve hotel accommodations. Registration and housing forms are sent in the December issue of the Kiwanis magazine and are also available at kiwanis.org/convention .	Follow due date instructions in the memo received.
Annual report for not-for-profit corporations	Secretary	In some areas (states, provinces, countries), a not-for-profit corporation such as an incorporated Kiwanis club is required to file an annual report. Check with a local tax attorney or appropriate governmental officer to determine whether this applies to your club.	Varies
Reports to government bodies relative to employee coverages	Secretary or Treasurer	In some areas, governmental bodies require employers' (including Kiwanis clubs that employ administrative secretaries, etc.) reports and payments and Federal Unemployment Tax reports for certain employees. Requirements vary from country to country. Check local governmental offices.	Varies
U.S. revenue act regarding fundraising solicitations	Fundraising chair (U.S. clubs only)	Legislation requires that any fundraising solicitation by or on behalf of Kiwanis clubs and Kiwanis districts must include an express statement that contributions or gifts to (insert club name) are not deductible as charitable contributions for federal income tax purposes. The statement must be in a conspicuous and easily recognizable format on all solicitations, whether in written or printed form, by television or radio, or by telephone.	Before any fundraising activity

Kiwanis Youth Protection Policies and Procedures

All adults working with youth under the age of 18 at any Kiwanis event are expected to read/understand, agree to, and abide by these policies.

effective October 2021



EDUCATION

Every Kiwanis club is expected to inform and educate its members annually on these policies, best practices and required actions for individuals who become aware of youth in potentially harmful situations. Each year, a club must provide members with a copy of these policies with educational training — informing them of the highest standards of conduct and awareness.

Every Kiwanis district is expected to provide an educational forum or workshop at every district-produced convention and conference regarding guidelines and best practices for adults working with youth, using materials provided by Kiwanis International.

CHAPERONE

A chaperone is defined as a Kiwanis member, faculty member, parent, legal guardian, or person who is *in loco parentis* (in the place of a parent), 21 years of age or older, who has been approved by the school or agency and registered with the school or agency to accompany the youth members at the specific event.



Chaperones for overnight events: A minimum of one adult per 10 students must be serving as chaperones during the entirety of an overnight event. All chaperones (club members and non-members) participating in any single-day or overnight Service Leadership Programs event must have a clear criminal history background check and must have completed Kiwanis International annual youth protection training. Additionally, chaperones must follow all applicable policies and procedures. (See also Procedure 432.) (2/20) (10/21)

Chaperones for single day events: A minimum of one adult per 50 students must be serving as chaperones during the entirety of a single day event. All chaperones (club members and non-members) participating in any single day Service Leadership Programs event must have a clear criminal history background check and must have completed Kiwanis International youth protection training. Additionally, chaperones must follow all applicable policies and procedures. (See also Procedure 432.) (10/21)

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 Programs club (Aktion Club, Circle K International, 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., 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.

All adults (club members and non-members) registered for or staying overnight at any Service Leadership Programs event must have a clear criminal history background check and must have completed Kiwanis International annual youth protection training. However, parents/guardians of participating students who are not chaperones may attend the event for a maximum of one overnight stay without a criminal history background check.



TRANSPORTATION



When transporting youth, the best practice is having 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



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.

Kiwanis International now offers a 24-hour, confidential helpline at 1-888-607-SAFE. The helpline can be used if you think a youth has been harmed or their safety and well-being are at risk.

MEDICATIONS



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.

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/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. Kiwanis International now offers a 24-hour, confidential helpline at 1-888-607-SAFE. The helpline can be used if you think a youth has been harmed or their safety and well-being are at risk.

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.

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, that Kiwanian 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.



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[kiwanis.org](https://www.kiwanis.org)