



**Opening a New Kiwanis Club  
Complete Guide**

**Compiled by members of the Kiwanis International  
Membership Sub-Committee on  
New Club Opening**

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## OPENING A NEW CLUB

There are as many ways to open clubs as there are people and personalities. The two methods we've chosen to discuss have yielded a high success rate. For a glance at the process, look at the newly updated Quick-start guide. It will provide you with a general overview of the club-opening process and help you stay on track once you begin. You can also find it [here](#).

Step 1: Prepare and Plan for Club Opening

Step 2: Meeting prospective members and invite to join

Step 3: Organize the Club

Step 4: Formalize and Establish the Club

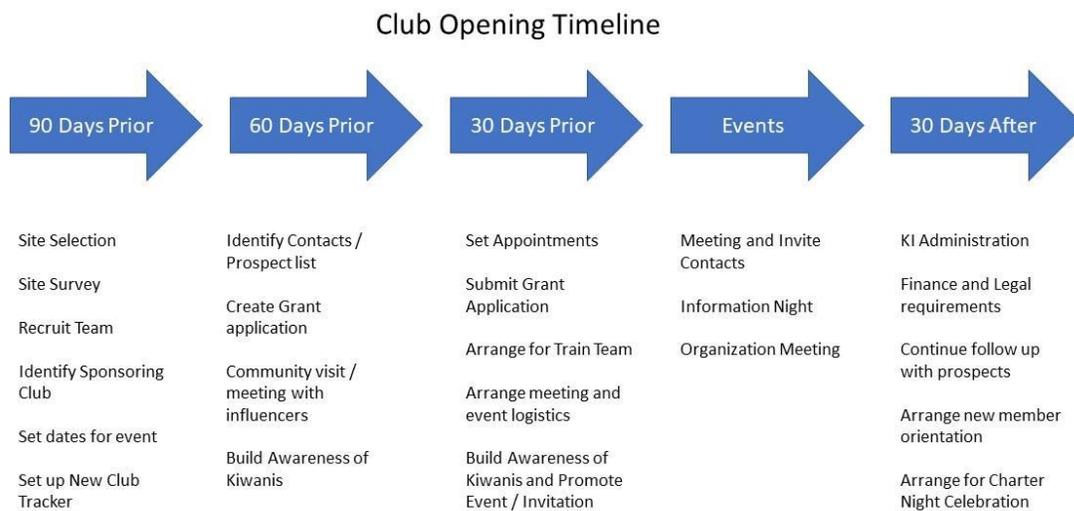
### Step 1: Prepare and Plan for Club Opening

Each Kiwanis District has a District Membership Coordinator. Before starting on a new club site, the club opener should inform the Coordinator and enlist their help in obtaining approval for the proposed club site. Some Districts have requirements of who can approve a new club site. The District Coordinator will also be able to provide

resource materials to the club opener to ensure all the needed steps are included in the planning and organizing of the new club.

### Timeline and plan for new club opening

Sample plans of activities 90 / 60 / 30 days in advance and beyond are available to act as a checklist for the new club opener.



### Important Links:

- [Sample Club Opening Plan 1](#)
- [Sample Club Opening Plan 2](#)
- [Sample Club Opening Plan 3](#)

### Identifying potential sites

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

- Is this going to be a single site build or will this be part of a multiple site club opening? If multiple their proximity to each other and the resources for the team must be part of the consideration. Refer to the section on multiple site planning

for additional information.

- Communities where Kiwanis and other service organizations are not meeting the needs of the community.
- Communities where demographics have shifted, and the individuals and groups are interested in new service opportunities.
- Communities with schools and no Kiwanis presence. Since Kiwanis is known for supporting schools and school children, these communities can provide a new club the opportunity to start a Service Leadership Program as its first service project.
- Large communities with several schools and only one Kiwanis Club Often this can become an opportunity for growth, either an adult Kiwanis club or an SLP.
- Schools with a Service Leadership Program, but no sponsoring Kiwanis clubs.
- Communities where there was previously a Kiwanis club. We often overlook this opportunity.
- Close enough so that Sponsoring Club or Club Coach can travel to the community.

Every new club opening event begins with site selection. It has been said that, "every community with a school is one that could support a Kiwanis club." To an extent that is true, but there are some additional factors that contribute to a good site for a new club.

Ideally, we are looking at small to medium sized population areas with a strong sense of "community." We will want to invite people who either work or live in the community and will want to see it develop and prosper.

The prospective community should have a business district with opportunities for networking with business professionals to network with. In addition, we often start by looking at and meeting with the local schools. Many communities have an "orphaned" Key Club.

## Exploring the community

The next step is community exploration. Collecting information that can provide a snapshot of the community will help you confirm that the site is viable, begin to consider how a Kiwanis club could benefit the community, and prepare for meetings with community leaders.

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

- What other service organizations already exist in the community? When and where do they meet? What projects are they known for?
- What is the area's economic situation and demographics?
- Is the community changing or expanding?
- What resources could be helpful to learn about the community?
- Who can you identify as a key influencer?

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

## Select the club opening team

The new club opening team is generally composed of the following:

- District Governor
- District Membership Coordinator
- Lt. Governor
- Club opener
- Club coaches
- Kiwanians to make appointment and make in-person contact with the prospects

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

Training included for:

- Making appointments and organizing
- Club openers
- Meeting the prospects – making direct contact
- Practice

You can find additional information on training [later in this guide](#).

### Laying the groundwork

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

Focus on the following at your meeting:

- assign prospects,
- practice what to say,
- how to build rapport,
- asking questions to determine how Kiwanis may fit the community,
- addressing common questions or concerns,
- extending an invitation to join, and
- plan a follow-up meeting.

### Using the club-opening tool

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

Use it to

- Help prioritize potential communities.
- Order and download resources to help invite members.
- Report the milestones to district and international leaders.
- Download the "community exploration" document in the new-club-opening tool at [www.Kiwanis.org/newclubtool](http://www.Kiwanis.org/newclubtool) or by clicking [here](#).

Before you start inviting, make sure you have the marketing materials that you need. Order the club-opening kit from the club-opening tool at least four weeks before you

plan to begin inviting members. You can download some of the resources for quick access.

The club opening tool is an important asset at your disposal. Administratively, it will help guide you through the club opening process.

You access the tool by logging into the Kiwanis Member's Site. To access the club opening tool, you must log in as your home club member. Once there, you can access the tool by clicking on Membership (on the left) and then the Club-opening tool on the right.

If you are beginning a new club opening exercise, you will want to choose 'Add New Kiwanis Club'. Fill out the initial information form and click continue. Don't worry about getting the information correct. It can all be changed later if necessary.

Under Form Your Team it is important to note that you can (and should) have multiple Club Openers.

The Resources button at the top of the form is an important one. Not only can you download and print several documents but (most important) you can click on the link that is labeled, "Order a club opening kit." Upon clicking this link, a form will pop up enabling you to request a free club opening kit from KI. You should order the kit early in the process. In fact, depending on the number of Kiwanians helping you may want to order more than one kit.

In-depth information on the use of this club opening tool can be found by contacting Membership Support and through your District Membership Coordinator

### [Finding a sponsoring club](#)

It is important to have a sponsoring club. The sponsoring club serves as the parent club, providing moral support, advice, leadership and inter-clubbing opportunities.

Sponsoring a new club always adds an element of excitement to the sponsoring club, stimulating enthusiasm and injecting energy into the club.

When the Charter Ceremony is held for the new club, the sponsoring club will play an important role.

While there used to be a financial obligation to sponsor a new Kiwanis club, that has been done away with, but we do ask the sponsoring club to pay the \$100 new member fee for each of the two club coaches serving as dual members.

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

The sponsoring Kiwanis clubs agree to

- Designate at least two members to be counselors and/or dual members of the new club. Generally, the sponsor club pays the dues for those dual members to join the new club.
- The sponsoring club should consider monetary support through a donation to the new club's administrative or service accounts.
- Assist the club opener and the core team members with visits and invitations to prospective members (recommended).
- Conduct inter-club meetings for the pre-organizational meeting(s), the official organizational meeting and the charter ceremony celebration.
- Assist the club Coach and lieutenant governor in supporting the new club.
- Assist with planning the new club's first service project.
- Continue to monitor the new club for at least one year and help it maintain the membership level necessary to remain in good standing with Kiwanis International and the district.
- The Board of the proposed sponsoring club should review the requirements and should sign a New Club Sponsorship Agreement form so they have clear expectation of their role.

### Club coaches for new clubs

The importance of club coaches cannot be stressed enough. Having two members join the new club with previous Kiwanis experience cannot be over accentuated.

It is always easier to effect change from within and is better to 'lead from behind'.

To help provide ongoing club support we recommend that two club coaches be selected from the sponsoring club. They become active, dues-paying members of the new club. We also recommend that the sponsoring club pay the new club membership

fee for the club coaches. We want these dual members to donate their time and not necessarily their money.

Experience has taught us that the new club is served best if one of these club coaches becomes the new club's Charter Secretary. The coach's goal is to mentor and train an assistant secretary to take over as soon as possible.

Choosing the right coaches is an important task. The first hand up is not necessarily the best. You will certainly want to choose people with Kiwanis experience, but (even more important) choose Kiwanians who will work well and mesh with the new club. The coach is there to guide and support the new club, not to tell them what to do and how to do it. Including two club coaches significantly increases the new club's chances for success.

For more information on club coaching, please click [here](#).

### Meeting with community leaders

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

Go into your meetings with these goals:

- learning more about the community and the person,
- getting referrals for potential members, and
- gaining the person's support for a new club—and perhaps a commitment to join.

Meeting these people is much like meeting with prospective members in the future. But your goal for these meetings is not necessarily focused on inviting the community member to join. Use your team members to identify people who have a connection with the people you plan to meet.

Some things to remember about setting up meetings. You should always first attempt to call the person's office to request a meeting. After connecting with a person, ask if you can use their name as a referral for others. If you run into objections (which are identified [here](#) and addressed later in the document), do not hesitate to remain persistent, but respectful.

Resources:

[Speaking with a Mayor or other elected official](#)

[Speaking with school officials](#)

[Talking points when meeting with a referral](#)

## Finding prospective members

Appointments begin with developing lists of potential prospective members. They can usually be downloaded or found on the Internet. Google Maps or Geo Mapping are great tools. A quick search for "Insurance companies" or "Banks" in a specific area will turn up lots of prospects.

- Schools, teacher principals, custodian's etc.
- Social Agencies that focus on children
- Banks / Financial institutions
- Insurance Brokers
- Financial Planners
- Public Libraries
- US Army Recruitment Offices
- Emergency Services (Police and Fire)
- City Hall employees
- Business Owners (Chamber of Commerce list)
- Local media, newspaper editor, radio personalities
- Local volunteer of the year
- Business Network International local chapter
- Chamber of Commerce

Identify prospective member details (name, company, phone, email, assigned to, contacted by, comments). A [prospect member contact card](#) can be used to collect this information.

Record the information in a spreadsheet ([sample here](#)) so you can track who has contacted them and if follow up is required.

This [prospective member list](#) is a critical tool to develop and be used during the club opening event. Contact your District Membership Coordinator for access for a sample spreadsheet.

Even after the club is formed, they may wish to recontact some of the prospective members once the club is established and has a track record. No often means "not now".

## Making appointments

Generally, people are busy, and time is a precious commodity. Numerous studies and our own experience have proven that we are more successful when we make appointments in advance with prospective members. They have set this time aside, so we have their time and attention and will more receptive to having a conversation.

Having a number of appointments set in advance ensures the club openers' time is more effectively spent than just "cold calling". Two weeks in advance of the club opening event volunteers should start calling the prospective member list to set appointment times. It will be more effective to have a team working on scheduling appointments, and not just a single person since it is virtually impossible for one person to set enough appointments for the field team in a 2-week period.

Ensure that you:

- Assign specific contact names to specific appointment setters to avoid duplicating calls to an individual
- Have a general idea of the geography of the target community area so you can allow reasonable travel times between appointment
- Maintain a common calendar of appointments and know how many teams will be in the field during the event. This will determine how many appointment streams you can arrange.
- Record the call and any comments they have made in the PROSPECTIVE MEMBER list so don't inadvertently make duplicate calls and the person meeting the prospective member has the benefit of your advance conversation
- Use a script as a starting point to you cover the important points. Several potential scripts have been developed that can be modified and adapted to local needs, level of formality and the audience.
- Have a person to monitor Facebook or other social media and messaging platforms for people wanting to connect.
- Keep calling even during the club opening event – to keep field team busy

- Have a person designated to follow up with contacts who cannot meeting during the club opening event days

Resources:

[Sample Script for making appointments](#)

[Sample email script](#)

Build awareness of Kiwanis in the community

The more aware the community is of Kiwanis and familiar with what we do, makes the new club opening more effective.

The Club Opener or District Membership Coordinator should seek the support of the District PR / Communications Chair and the professional communications staff at KI to plan and coordinate the execution of communications supporting new club opening.

Multiple communication channels can be utilized to build awareness and interest in advance of the club opening event. (Newspaper, Social Media, Posters and Flyers)  
More information can be found in the resource "[Building Community Awareness of Kiwanis](#)"

The key message should be about the impact "you'll make helping kids in the community." The content is not about Kiwanis. It's not "Kiwanis is coming" or "Join us for a special night of Kiwanis." It's "Help kids thrive" or "Help us help kids" or "Make a difference for kids" or "Kids need you."

## Step 2: Meeting Prospective Members and Extend Invitation to Join

When the club opener is ready to start meeting the prospects, the following documents are recommended to have ready and available:

- A copy of the prospective member list and appointments
- Application Forms:
  - Order Paper [Application Forms](#) **here.**
  - [Membership applications](#) –PDF fillable application that could be emailed to the prospect.
  - [Alternative PDF fillable Application 2](#)

- [Alternative PDF Fillable Application 3](#)
- Corporate membership information – [there is a prepared document that should be part of your new club building kit](#). To obtain copies, contact your District Membership Chair. For additional (internal) information, [click here](#).
- [W9 form](#) (US only) – some prospects will need a copy of the Kiwanis W9 form – have a supply of these in your new club building kit. Generally, a bank may require this form.
- Forms of payment – if the District accepts payment by credit card, it is recommended the club opener format a handout with the instructions that can be left with the prospect. Here is a [sample](#). If payment is to be by check, the check should be made payable to “Kiwanis”.
- Dues Invoice – some prospects will need an invoice. The club opener should have a preformatted invoice in their club building kit and should have a fillable form that they can prepare and email to the prospect.
  - [Sample Invoice 1](#)
  - [Sample Invoice 2](#)

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

- Create a relationship, establish consensus, opening two-way conversations effective line of communications and get referrals within the community;
- Continue discovering community goals and needs;
- Introduce the community to Kiwanis and its benefits;
- Invite the people you meet to support Kiwanis;
- Invite the people you meet to join as a charter member; and
- Ask for referrals to other like-minded people.

The tone and message in the conversation will vary depending if you are talking to the community mayor or other elected officials, the school superintendent and principal or someone who you haven't had previous contact with.

Similarly, the age and background of prospective members will alter the approach and types of questions you will likely encounter.

## Developing rapport

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

1. Introduce yourself.
2. Mention the person who referred you (if applicable). Let him/her know you represent Kiwanis.
3. Ask, "Are you familiar with Kiwanis?" If Yes, ask, "How did you hear about us?"

If "No," briefly describe Kiwanis. Probe if they know Key Club or CKI. Here's one way to do that: "Kiwanis is a global organization of volunteers dedicated to improving the world one child and one community at a time. What differentiates us from other service organizations is our emphasis on youth. Our goal is to plant a seed in the mind of our youth by showing them the importance of service at a young age with the hope that they will develop an appreciation for giving back to the community."

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

- Remember that the meeting is about the prospect. Scan the office space for pictures of kids, special awards, etc. that may be an ice breaker.
- Look the person in the eye and firmly shake hands.
- Show them you're genuinely happy to meet with them.
- Ask questions, actively listen and show interest.

People join service clubs and volunteer for a variety of reasons. Look for signs of what would motivate the prospective member:

- Giving back – to leave a legacy
- Belief in mission / cause – to support children
- Personal development and enhance skills
- To connect and develop friendships (for business or personal reasons)
- To provide an example for children or grand children
- Make a difference

## Make invitation to join Kiwanis

Often when people learn they were recommended to you by an influential member of the community, they're receptive to Kiwanis and what it has to offer. But your approach in introducing the organization—and in inviting them to join—ultimately dictates whether they offer you a completed membership application. When you visit people with the objective of asking them to join a club, the goal is for them to make three commitments:

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

## Overcoming objections

You can expect to get objections, questions and concerns voiced by the prospective member. This is normal. These concerns will need to be addressed before the person agrees to become a member.

Common concerns or objections might include:

- **TIME:** I'm busy. I don't have time. I already belong to ...
- **COST:** How much does it cost to join? This sounds like a lot of money. Why should I pay to volunteer?
- **CAUSE:** What does Kiwanis expect of me? How much money stays in the community? How do you get involved in the community? How do you decide what projects you do?
- My company moves people around a lot – I may not be here for a long time.

Talking points to help you address these common concerns can be found [here](#).

## Following up on referrals

Often, it isn't what you know that makes a difference, but who you know. That's the logic behind the referral method. The referral method, which works particularly well in

North America, involves meeting people and asking them for contacts. A referral can lead you to potential members.

Begin the process by talking to at least two leaders in the area. These should be people who have their fingers on the pulse of the community and can help identify potential projects for the club. These visits are generally made by the club opener and lieutenant governor before the rest of the team gets to work.

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

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

Explain that:

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

### Explaining next steps

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

Effective selling takes practice. It is not easy. If it was easy, we'd all be great salespeople and Kiwanis would have more members than the top two service clubs (in membership) combined.

The biggest fear that we have (perhaps next to spiders and snakes) is the fear of failure. Right behind the fear of failure, running a close second, is the fear of rejection. It is important to remember that these fears, failure and rejection, are simply a state of mind. As the saying goes, "If you think you can, or you think you can't, you are probably right." Most of us feel more secure having an appointment as opposed to a cold call. The truth is that if you can connect with a decision maker on a cold call, the likelihood of success is the same as if you had an appointment. Of course, the likelihood of speaking to a decision maker is reduced on a cold call. On average only one out of five sales calls will result in an actual sale.

**Tip:** Become more familiar with these SLP programs.

#### Method 1: Information meetings

There is safety in numbers. Perhaps the comfort of knowing others are moved to act is one reason group meetings work well. This is also helpful if you don't have 15 members in order to have an official Organizational meeting.

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

You can create traffic for your membership event via the personal asks, Facebook events, media advertising, and other online sites like Meetup.com.

#### Method 2: Organization meeting

If you already have more than 15 paid members you should go directly to the organizational meeting, which is described in greater detail in the next step.

Before the meeting, make sure to:

- Look for a location. An ideal location could be a library, town hall, church hall or chamber offices. The selection is important as it must be familiar to most participants in the meeting.

- Search for a speaker. Choose an ideal speaker/presenter for your team. This person should be an experienced Kiwanian who is comfortable in presenting Kiwanis in the best “light” possible. He/she must have a good script and presentation developed before the event.
- Plan for success. Set a well thought out agenda that helps you accomplish the goal of the meeting, which is to gain support from as many participants as possible.
- Involve the influential people in asking the audience to be open-minded and to endorse the speaker and Kiwanis.
- Brief introduction to Kiwanis (Keynote speaker)
  - The opportunities and benefits of Kiwanis service, focusing on the needs identified in the community exploration (Keynote speaker)
  - Sharing Kiwanis stories: Enlist members of your team to engage the audience. The greater the connection the prospective members feel to the Kiwanis mission and the benefits of organizing one, the more likely that they'll decide to become part of the club.
- Question and answer period
- Remind often. Ask that the community leaders contact their guests a few days before the meeting to remind them of the date, location and time.

During the meeting:

- Set the tone. Designate a team to welcome guests and make them comfortable.
- Spell it out. Let the prospective members know how the lives of the children in the community can be improved by opening a Kiwanis club.
- Be punctual. First impressions count. Start and end on time.
- Make it personal. At the end of the meeting, divide up your team members so that someone can approach each prospective member to discuss the commitment to join the new club.

- Follow up. If you can't get a commitment at the time of the meeting, ask when you may follow up to answer any questions. This is a good time to let them know what an asset they would be to the new club. More likely than not, the club-opening team will need to conduct one or two more meetings to complete or exceed the minimum number of members required to organize a Kiwanis club.

**Tip:** Look at the PowerPoint "[An introduction to Kiwanis](#)".

Regardless of the method you choose to invite them, once there is a significant number of members committed to the club, it's time for the next step - organization. Be sure to update the tracker after your event if possible.

### Step 3: Organize the Club

#### Introducing the club coach

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

Getting down to business—and fun!

Although a minimum of 15 paid members are needed before the organization process can begin, aim to invite at least twice that many. Then the fellowship begins. The goal for new clubs should be 20-30 charter members, if possible. While 15 members is the minimum required by KI, 20+ is ideal.

You can expect to lose 10% or more charter members in the 1<sup>st</sup> year as they will withdraw based on many reasons such as time commitment or non-engagement. Schedule a series of meetings that allow the members to get to know each other and introduce them to Kiwanis. Invite the club's new members to take part in pre-organizational meetings to prepare the club to be organized.

#### Pre-organizational meetings

Once the team has secured the minimum required number of members, it's time to begin the process of organizing the club. Use pre-organizational meetings to prepare the club to be organized. Depending on member availability you may choose to hold one or two pre-organizational meetings. If you choose two pre-meetings to cover all the material, we suggest dividing the process up this way.

#### MEETING 1: Purpose to Orient New Members and Get to Know You

- Consider having light snacks.
- Encourage members to get to know one another.
- Hold a "focus group / discussion" on what the new members wish to accomplish in the community by joining Kiwanis.
  - Serve children,
  - Address a major issue in the community,
  - Build a playground,
  - Start a youth drop-in center, etc.
- Offer an introduction to Kiwanis and explain how a Kiwanis club works. Refer to the new-club orientation program.
- Membership benefits and club expectations
- Explain the process of forming the club
- Encourage potential leaders to be on the nominating committee, which is chosen at the next meeting.
- This is also a good time to discuss organizing a fundraiser, such as a silent auction, at the club's charter night to help the club raise funds for its service account. Silent auctions promote the club in the community and increase attendance at charter night. Refer to the "Planning a charter night silent auction tool" in the Resources section.

#### MEETING 2: Getting Ready for Organizing Meeting and Additional Orientation

- Answer any additional questions about Kiwanis provide addition overview of Kiwanis.

- Discuss the agenda for the official organizational meeting (which is discussed below) and review key decisions to be made at the official organizational meeting.
  - Club types
  - Naming Convention for Clubs
  - [Roles and Responsibilities of the Club Board and Officers](#)
  - Elections of Officers and Board
  - Adopt Bylaws (an [overview](#))

### [Pre-organizational Meeting Sample Agenda](#)

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

These meetings set the scene for the club's democratic process, future activities and leadership, so encourage each new member to attend.

### Determining a club type

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

Kiwanis International offers different types of clubs to meet the needs of a diverse world. These club types were created to attract potential members who share common lifestyles — and to offer service opportunities to more people. The new club members determine which club format best meets their needs and lifestyle. Kiwanis club models include:

#### **CLASSIC KIWANIS CLUBS**

The traditional club found in most communities today, the "classic" type fits many communities and can be adapted to diverse groups, corporations or specific professional societies.

#### **INTERNET-BASED CLUBS**

Offering flexibility for those who travel often or cannot attend traditional meetings, Internet-based clubs operate in much the same way as classic clubs. However, meetings are generally held in chat rooms, and officers use technology extensively to keep members informed and connected.

## **YOUNG PROFESSIONALS CLUBS**

These clubs meet the needs of younger members with busy lifestyles, generally offering more flexible meeting schedules and hands-on service projects. In addition, young professionals' clubs conduct social activities for members and families, and they use technology in club operations and administration

### **3-2-1 CLUB**

This club type reflects a desire to meet less and do more. A 3-2-1 club represents three hours of service, two hours of social activity, and a one hour meeting each month. This is a great option for people whose schedules make it hard to attend club meetings frequently.

Most folks are as committed as ever to service and community involvement. They appreciate the opportunities Kiwanis club membership provides. But life is busy. A 3-2-1 Kiwanis club is an excellent option for people with demanding schedules. Inspired by feedback from current and past members, the 3-2-1 club is also a good fit for those who prefer a membership that emphasizes activities and projects outside of meeting rooms.

**HOW IT WORKS** A 3-2-1 club meets for about three hours each month to conduct service projects, two hours each month for a social activity and one hour each month for club business. The monthly one-hour meeting takes the form that club members deem appropriate to the club's needs. It may be a traditional Kiwanis club meeting. It may be more like a board meeting. Or it could be a meeting in which members organize club activities and service projects for the following month. The meeting will be whatever its members need it to be. 3-2-1 club operations work the same way as a traditional Kiwanis club. Each 3-2-1 club organizes, charters and pays dues just as any other club does.

**WHEN IT WORKS** Willing hearts, hectic schedules. You've talked to several people in your area about becoming Kiwanians — but you're finding they have far more desire for service than time to do it. The traditional weekly schedule for club meetings just isn't feasible. A 3-2-1 club is a possible solution.

**How many members are required to charter a 3-2-1 club?** You need 15 members — just like any other Kiwanis club.

**How does the 3-2-1 format affect the connections between members?** With three potential interactions each month, a 3-2-1 club allows members to build strong relationships while applying the largest part of their membership to service. And club leaders can focus on creating 12 excellent meetings each year.

**How does club leadership function?** As with a traditional club, administrative and leadership functions can be addressed in separate meetings for board members and club leaders.

**Can a 3-2-1 club sponsor a Service Leadership Program club?** Yes! In fact, a club format that emphasizes service projects and community activity is well suited to SLP

For more information on types of clubs, consult the [Kiwaniis International Website](#).

Organizational meeting and first official Board of Directors meeting

Once you have enough participation, the Organizational Meeting of the club's Board of Directors will determine the administrative and working elements of the new club. During this meeting, club members get started with the business of the club. Here's what they do:

- Choose the club's official name. For guidance, review the [Kiwaniis policy on Club Naming](#).
- Set the amount for annual dues. See the New-club fees [worksheet](#).
- Approve club bylaws. Sample Club Bylaws can be found [here](#).
- Identify club [committees](#).
- Elect club officers and the board of directors.
- Plan for club [member and leader education](#). You should consult with your club coach and District Education Chair on this process.
- Choose the date for the club's charter night. Click [here](#) for information on planning a charter celebration.

*Here are some fast facts about this important meeting:*

- The first board of directors meeting immediately follows the organizational meeting.
- Fifty percent plus one of the signed and paid members must be present to conduct the organizational meeting. For instance, if you have 30 individuals who have committed to becoming members, at least 16 of those members must be present.
- Report the new club to Kiwanis International within 24 hours using the club-opening tool.

- Inform your district's governor of the club's organization. Tell him or her to expect an invitation to a charter ceremony in the future.

## Step 4. Formalize and Establish the Club

### Kiwanis requirements

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

Submit the [New Club information sheet](#) within 24 hours of organizational meeting.

This information identifies Club level information (name, community, sponsoring club, etc.).

Within 30 days of the organizational meeting, additional information needs to be submitted

[Permanent organization roster](#)

[Standard Form for Club Bylaws](#)

[Charter member fees](#)

The Club Opener shall send a copy of the organization roster and club information sheet to the District Governor, Lt. Governor and District Membership Coordinator.

After the club completes the necessary paperwork and submits its fees, Kiwanis International will:

- Assign the club a key number.
- Issue a charter certificate.
- Provide certificates and pins to give members at the charter ceremony.

It will likely take 4–6 weeks for these items to arrive.

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

New clubs can choose either a traditional charter gift (including the gong, gavel, personalized club banner and a Kiwanis flag) or a merchandise certificate from the Kiwanis Store to purchase the items that best fit its needs.

## Legal and financial requirements

While Kiwanis has certain requirements, check the requirements for incorporation in your state or province.

Please see the [Guidance from Treasurer's Manual](#) for some additional information.

## Legal incorporation

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

KI Member Services provides a [memo](#) with the steps and procedures to incorporate as a 'not for profit' corporation in the United States. Outside of the United States please consult your Governor or District Secretary.

Step 1. The club needs to [adopt a resolution](#) (Form A) as well as its [agreement](#) (Form C) of its intent to incorporate.

Step 2. Draft the Articles of Incorporation and other documents required by local statutes and regulations. The Articles of Incorporation, Form A, and Form C are sent to Kiwanis International for initial review. Once approved by Kiwanis International, you can submit to your local state or provincial agency.

## What's optional and what's not

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

## REQUIRED CLUB BYLAWS

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

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

### Banking and financial arrangements

#### Types of bank accounts

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

One of the very first matters for the Board of Directors of a new Kiwanis club to address is opening two accounts to maintain the club's administrative and service funds. The board needs to approve the designated bank, as well as authorize at least two people to sign for the deposit and withdrawal of funds. Banks in the United States require clubs to

furnish an Employer Identification Number—which clubs apply for from the Internal Revenue Service—when opening an account.

### Signing officers

Typically, Club bylaws will have two of three members to act as signing officers of the Club. (President, Secretary, Treasurer, Other). From a business controls perspective, the person who records the transactions and reconciles the bank account should not be a signing officer. The club board has the responsibility to ensure adequate financial controls are in place

### Financial Review

All clubs must prepare an annual financial review and annually submit documentation to Kiwanis International. Based on the size of revenue and assets this may be a simple “notice to reader” reviewed by two knowledgeable club members up to and including a full audit performed by a CPA. As the revenues of the club grow and asset amounts increase, the club should consider more rigorous options and a fully arm’s length approach to attesting the financial statements of the club.

Consult with Kiwanis International for the requirements applicable.

### Insurance Coverage

Members in the United States and Canada pay an additional US\$13 fee for general liability insurance. The general liability insurance covers bodily injury or property damage arising from a Kiwanis sponsored function or activity. In addition, members in the United States and Canada pay a US\$4 fee for a directors and officers insurance program. The D&O liability insurance protects club or district assets and the assets of members against the cost of lawsuits.

Just a few of the potential costs covered include:

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

Depending on specific club activities and risks, a club may wish to consider additional insurance coverage. Consult your District Risk manager or KI Insurance specialist. Click [here](#) for more information.

## Tax Forms

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

### In the United States

IRS Requirement for Section 501(c)(4) Organizations - [Form 8976](#)

All newly formed 501(c)(4) organizations are required 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 EIN to Kiwanis International who then reports it to the IRS as part of its annual Group Exemption Number filing (GEN 0026).

All new Kiwanis Clubs need to file Form 8976 and that it does not matter that the club is part of a group exemption.

Or you may contact your Kiwanis District Office or email Kiwanis International at [finance@kiwanis.org](mailto:finance@kiwanis.org).

### In Canada

In Canada, clubs will typically be incorporated so will have annual reporting requirements to the provincial or federal jurisdiction they are incorporated under Society / Not for Profit Acts or Corporate Organizations acts.

Some Kiwanis Clubs in Canada may also wish to issue tax receipts for donations received in support of charitable purposes. In Canada charitable receipts may only be issued by Registered Charities. Should a Club wish to obtain "Registered Charity" status for certain

of its charitable activities a completely separate entity (Corporation or Trust) would be required since to qualify for registration as a charity., Hence Clubs may need to establish a separate entity a that would apply for and subsequently meet and maintain the requirements applicable to Registered Charities including separate additional filing and reporting requirements.

Consult your Governor, District Secretary or local solicitor for more detailed advice.

## DEVELOPMENT AND TRAINING OF THE CLUB OPENING TEAM

### Club opening team

The new club opening team is generally composed of the following:

- District Governor
- District Membership Coordinator
- District Trustee (if applicable)
- Lt. Governor
- Club opener
- Club coaches
- Kiwanians to make appointment for the local team
- Kiwanians to make in-person contact with prospects

Training should be arranged for:

- Club openers
- Making appointments and organizing visits
- Meeting the prospects – making direct contact

### New club opener

It is important to familiarize yourself with the [Characteristics of the New Club Opener](#) from Kiwanis International. Another helpful resource is the [New Club Openers Guide](#).

Organizational Support Structure for the Club Opening Team:

District Governor	
District Trustees (if applicable)	District Membership Coordinators
Lieutenant Governors	Club Openers
Division Membership Chairs	Club Coaches
Sponsoring Club	

Training the New Club Opener: In addition to reading this publication, you should retake the Kiwanis International [New Club Opening online training](#) if you have not done so recently. You should also review "[Tips for new Kiwanis club opening events](#)".

### Training

To Make Telephone Calls: Making Appointments Opening Effort

Recruit a few district leaders to make telephone calls and set up appointments a month or so before your club opening event. As with any volunteers, it is critical to ensure that they are motivated and committed to the task at hand. You should encourage all volunteers who will be making phone calls to prospects to take the Kiwanis International New Club Opening online training and attend district or division club opening training or seminars.

You should also share with them the tips and recommendations previously discussed in ["Step 2: Meeting Prospective Members and Extend Invitation to Join"](#).

Their attention should be directed to (these links take you to other parts of this document);

- ["Developing Rapport"](#),
- ["Make Invitation to Join Kiwanis"](#),
- ["Overcoming Objections"](#), and
- ["Following up on Referrals"](#).

They should also be directed to the sample ["talking point"](#) guides and the "Sharing Kiwanis with Strangers" in the resources.

Prior to making their calls, you should remind your callers of some tips and selling points that may prove helpful. You should refer to the "Just the Facts" sheet.

Sample scripts for telephone calls are discussed [here](#).

Spreadsheets: You should instruct them on how to use the form of spreadsheet that you have chosen to use on the Club Opening Event. They should be informed of the extent of their authority to update it or otherwise add information and precisely what information you want recorded. They should be trained on how to make those updates.

## To Meet Prospective Members and Extend Invitation to Join

Your volunteers should be divided into two person teams to go out into the field to meet prospective members by appointments or cold calls. Ideally, one of them will have club opening experience. You should encourage them to take the Kiwanis International New Club Opening [online training](#) and attend district or division club opening training or seminars.

You should also share with them the tips and recommendations in ["Step 2: Meeting Prospective Members and Extend Invitation to Join"](#).

Their attention should be directed to "[Developing Rapport](#)", "[Make Invitation to Join Kiwanis](#)", "[Overcoming Objections](#)", "[Following up on Referrals](#)" and "[Explaining next steps](#)".

They should also be directed to the sample "talking point" guides and the "Sharing Kiwanis with Strangers" in the appendix.

Prior to making their visits, you should remind them of some tips and selling points that may prove helpful. Explain to every participant the three-step approach to utilize when going on appointments and making cold calls:

- As the prospective member starts expressing interest in our organization, ask them to sign the Kiwanis membership application.
- Once a prospective member has indicated they plan to join, explain that the new club will need some seed money with which to start planning service projects, and ask that person to secure their spot by paying their one-time new member add fee. (Usually \$100, but it depends upon the district fee.)
- Before leaving any appointment or cold call, ask for three to five referrals of folks from their arsenal of like-minded friends and business contacts who would be logical additions to the new club.

Impress upon every participant the importance of filling out the [prospect information cards](#) as completely as possible. Remind your team members about referrals. Consider recruiting one person to serve as your "referral point guard" to continue making more appointments for the club opening event from the referrals they solicit.

Ask the team members to debrief between appointments and cold calls. They should discuss what worked well during the call, in addition to sharing approaches that may have been more effective. Ask them to attend a debriefing session with your club opening team after the first day of your event. As the individual teams go on appointments and make cold calls, ask them to be on the lookout for folks who seem to be good leaders who are visible in the community. They may even want to plant the seeds that the new club will be electing a president, president-elect, secretary and treasurer.

You should instruct them on how to use the form of spreadsheet chosen for use on the Club Opening Event. If you want them to update the spreadsheet after each of their

visits with prospects, they should be informed of the extent of their authority to update it or otherwise add information and precisely what information you want recorded. They should be trained on how to make those updates.

## Practice

During your training of the persons going out to meet prospective members, especially those who have not participated in a club opening event previously, it is often helpful to “practice” meeting with prospective members. This may involve using the “[Talking Points](#)” sheets to practice how the Kiwanian will approach the prospective member. It would be beneficial for members to practice in both the role of the Kiwanian approaching the prospective member, and the role of the member.

## Develop a district club opener network

District Membership Coordinators are encouraged to rate their current New Club Openers on a three-tier basis:

1. Those who need little or no assistance to be able to open a new club. These would be people who have been properly trained and have experience in opening new clubs.
2. Those who need additional assistance to be able to open a new club. They have had training and some hands-on experience.
3. Those who need assistance and guidance in opening a new club. They have no practical experience and/or training.

They are also encouraged to identify other qualified Kiwanians in their District who would be good new club openers who are not on current club opener lists, either by experience helping with club opening efforts or by demonstrated ability and enthusiasm for Kiwanis. To avoid burnout of New Club Openers, the Membership Coordinators should rotate club openers and not merely rely on a small number of them to work all club openings.

The District Membership Coordinators should also analyze the capabilities, training and willingness of current Lieutenant Governors, Past Lieutenant Governors and Past Governors to serve as New Club Openers.

## Incentives and volunteer motivation

Districts should consider offering incentives to Kiwanians involved in opening new clubs, particularly New Club Openers. Each district should select the incentives that they believe will have the most impact with their members. Incentives to be considered might include the following:

- Recognition at local, division and/or district levels
- Recognition at Mid-Year or District Convention – with an award of sorts
- Certificates for reaching milestones
- Awarding Ruby Ks for all members of the club opening team who recruited 5 or more new members to the new club, keeping in mind the tiers of achievement.
- The “You Hold the Key” campaign was highly popular and a campaign similar would provide incentives at all levels: Club, District and International.

It is recommended that all incentives be as immediate as possible. They should also be publicized District-wide.

For other ideas on creative ways to recognize members, visit [here](#).