

ACHIEVING CLUB EXCELLENCE

Tools for improving service,
fundraising and fellowship.



Kiwanis®

You can find Achieving Club Excellence (ACE) Tools to alleviate specific concerns your club encounters. Refer to the back cover of this booklet or visit kiwanis.org/acetools.

You also can work through all, or most, of the tools by progressively completing the tools successively in five categories.

YOU ARE HERE

Community survey
Member survey

DREAM YOUR FUTURE

Club vision

ANALYZE THE GAP

Evaluate your impact
Develop partnerships

PLAN YOUR COURSE

Club excellence plan

ACTION NOT WORDS

Club scorecard
Host potential members
Celebrate

Complete information about ACE Tools can be found at kiwanis.org/acetools.

COMMUNITY SURVEY GUIDE

PURPOSE: To provide a step-by-step tool that helps clubs gather data about community needs from people in the know, and to help the club's service impact, partnership opportunities and possibilities for expansion.

AUDIENCE: Board members and general membership. Club coach, where applicable.

FREQUENCY: Annual — or any time the club has experienced significant changes in its membership, service interests or community needs.

STEP 1: CREATE CONTACT LISTS

Brainstorm to identify community members who could provide the most useful information. To make sure your list is demographically diverse, consider:

- Club partners and other groups with which the club has a relationship.
- Community leaders.
- Government and non-governmental organization officials.
- Public safety officials.
- School administrators.
- Service Leadership Programs' faculty advisors and students.
- Chamber of Commerce or other local business association leaders.
- Librarians.
- Members of the local media.
- Hospital directors and public health organizations.
- Members of faith-based organizations.
- Key business owners.
- Representatives of other organizations serving children.



STEP 2: IDENTIFY TEAM MEMBERS

Ask members if they have personal connections to any of the community contacts. If so, assign them to interview those contacts. Consider conducting interviews in teams of two to ensure detailed notes are taken.

STEP 3: SCHEDULE & CONDUCT INTERVIEWS

- Determine which team members will contact which people or groups and the time frame in which interviews should be completed. Interviews can take place in person, via video/online chat, phone or email.
- Attempt to schedule a 30-minute meeting with the community contacts/groups.
- Research people by using social media or websites to help direct your conversation.
- Make sure you have the most updated Kiwanis International application and information to give them (whether in person or by email.)
- A scheduled meeting is preferred, but if an impromptu opportunity presents itself, keep it under 10 minutes, and reschedule a time for more in-depth discussion.
- At the interview, reintroduce yourself and remind them what you hope to gain from the meeting. Assure them that all questions are optional, and they can take as much time as they wish to answer.
- Whatever interview format you use, be prepared. Keep the meeting focused. Capture responses in one place, whether in a notepad or on tablet or laptop.
- For specific questions customized for some selected professions, use the **listening tour** resource.



INTERVIEW TIPS

Introducing yourself (on the phone if setting an appointment, or in-person for impromptu meetings)

"Hello, my name is _____, and I belong to the Kiwanis Club of _____. It's good to meet you. Our club does projects like _____, and we would like to expand our service. Would you have a few minutes to give me your opinion of some of the current needs in our community? Or can we schedule a time to talk in the near future?"

Closing the interview

"Thank you for your time. We really appreciate it. If you think of any additional needs that we didn't talk about, please call me. Our club meets... We'd love for you to join us."

Be sure to offer a Kiwanis invitation or some type of contact information!

EXAMPLE QUESTIONS

You don't have to ask all of the questions below — but we encourage you use this list to create the survey that works for your club and its community.

1. What do you think our community does well? What do you like best?
2. What would make our community a better place to live, work and play?
3. What are some unmet needs of children in our community? What should concern us most?
4. Which organizations or groups are working to make our community better? Which are improving children's lives?
5. What is your wish list for our community?
6. How do you see yourself getting more involved in improving the community?
7. What are the greatest barriers to community involvement for you personally (if applicable) or for community members?
8. What would get people excited about volunteering in the community?
9. Who are the most respected and influential people and organizations here?
10. Who else should we talk to about how we can help the community?
11. Do you have any needs that our club can assist with?
12. What, if anything, is currently being done to address those needs?
13. What are the most important events that take place in our community?
14. Do you have any questions, comments or final thoughts?

STEP 4: DEBRIEF & REFLECT

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

Questions to keep in mind:

- Was any information obtained that suggests need(s) for club action?
- Did members hear any of the same community needs? Which seemed to be the top priority?
- Does the club have the interest and financial means to pursue new projects? (Take a look at **Evaluate your impact** for ideas on weighing the costs and benefits of potential and current projects.)
- Was there feedback about past Kiwanis service that should be addressed?

- How might the club help resolve frequently noted community concerns?
- Is there an upcoming service project to which you can invite individuals?
- What people or organizations could you create relationships with? (Look at **Develop partnerships** for more ideas about sponsorships and partnerships.)



If some issues warrant further discussion between community leaders and organizations, consider using the resource for **conduct an open forum** with a cross-section of influencers.

STEP 5: MOVE FORWARD

Based on the needs and the ideas you've generated, use the other Achieving Club Excellence tools to create a more impactful future for your club and your community.





COMMUNITY SURVEY SUMMARY

CONTACT NAME

TITLE

INTERVIEW DATE

Community events that club members should attend: _____

Community needs and service opportunities: _____

Media and marketing ideas: _____

Fundraising ideas: _____

Other people and/or organizations to contact: _____

Feedback about our Kiwanis club: _____

Additional thoughts and comments from the contact: _____



MEMBER SURVEY GUIDE

PURPOSE: To help club leaders evaluate how effectively your club meets members' expectations. This survey is the first step to ensuring your club provides a positive experience. The information gathered can help improve your club's operations and member experience, which can increase your club's membership, service impact and visibility.

AUDIENCE: Board members and general membership. Club coach, where applicable.

FREQUENCY: Annually — preferably at the same time every year.

CONSIDER SURVEY OPTIONS

Members want to love their club. They want to feel satisfied with the value they get for their time, talent and money. This tool will help make improvements through member feedback. Begin the conversation using one of these options:

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



EVALUATE THE RESULTS

Develop and refine club goals by identifying what actions your club needs to take (or continue) during the coming year — and what it should stop doing. Average out the results of your surveys. Then share the findings with your members via email, in your newsletter or in a presentation during a meeting!

IS THE CLUB SCORE 110 OR MORE?

Congratulations! Celebrate your success and think about how it can inspire improvement. What are you doing well? How might those qualities bridge the gap between your club's strengths and opportunities for improvement?

IS THE CLUB SCORE BETWEEN 80 AND 109?

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

IS THE CLUB SCORE LESS THAN 80?

Thank you for your honesty. The first step toward change is acknowledging that it is necessary. Where do you start? Discuss. Whatever your club's results, you have resources that can help you make improvements.



SEARCH FOR SOLUTIONS

- **Member experience.** Visit kiwanis.org/club-toolbox for resources that will help you invite new members and improve your club. How often do you thank or recognize members? Discover more ways to celebrate good work with the **Celebrate success** tool.
- **Leadership and education.** Visit kiwanis.org/club-toolbox for resources that will help club officers make the club stronger and more service-oriented.
- **Service impact.** Here are a few ways to increase your hometown presence:
 - Take a look at the **Evaluate your impact** tool. It will help you think about how to improve service and fundraising.
 - Explore kiwanis.org/blog for tips, ideas and success stories.
 - Talk to people in your community. Check out the **Community survey** tool. Interviews can help the club understand community needs — and how community leaders believe Kiwanis can help. This may also uncover opportunities for new partnerships or sponsorships, so check out the **Develop partnerships** tool.
- **Community visibility.** Visit kiwanis.org/branding-marketing for ideas on using social media, public relations and branding to create a stronger image in your community. And shop at the Kiwanis Family Store for branded apparel that members can wear at club events and everywhere else.
- **Financial viability.** The Kiwanis Children's Fund offers grants and other areas of assistance. Find information about club grants at kiwanis.org/grants. Learn more about the Children's Fund on their home page on the Kiwanis International website.





MEMBER SURVEY



YOUR OPINION MATTERS

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

What makes our club special? _____

If you could change one thing about our club, what would it be? _____

What do you wish our club would start doing? _____

Additional comments or thoughts? _____



**Rate the following statements about club operations using this scale:**

5 = Strongly agree 4 = Agree 3 = Neutral 2 = Disagree 1 = Strongly disagree

MEMBER EXPERIENCE

- ___ I am satisfied with my overall experience as a member.
- ___ Our club regularly recognizes our members for their contributions and achievements.
- ___ I enjoy our club meetings because they are fun and well-organized.
- ___ I am comfortable inviting guests to our meetings and events.
- ___ Our club holds meetings and events at times and locations that fit my schedule.
- ___ Our club welcomes new members in a meaningful way.
- ___ **TOTAL**

LEADERSHIP & EDUCATION

- ___ The club has a clear leadership succession and mentoring program.
- ___ Our club leaders communicate effectively to our membership.
- ___ I am willing to assist in supporting a new club nearby to help more children.
- ___ Orientation and continued education about Kiwanis are provided to members.
- ___ Our club has a clear purpose that guides our plans and goals.
- ___ I feel comfortable sharing my thoughts and concerns with club leadership.
- ___ **TOTAL**

SERVICE IMPACT

- ___ Our club offers many opportunities to create an impact in our community.
- ___ Our club is willing to implement new service projects in our community.
- ___ I am proud our club is a hands-on, service-oriented club.

- ___ There is member interest in most of our projects.
- ___ Our community has a need for our service projects.
- ___ Our club projects are worthwhile, rewarding and impactful.

___ **TOTAL****COMMUNITY VISIBILITY**

- ___ Our club is highly visible and viewed as a major asset in our community.
- ___ Our club is seen as an important advocate for children in our community.
- ___ I can say in one sentence the impact our club has in the community.
- ___ Our club partners with community groups and individuals on large-scale projects.
- ___ Our members share Kiwanis stories that inspire others to participate.
- ___ My club involvement has expanded my networking connections and/or forged new friendships.

___ **TOTAL****FINANCIAL VIABILITY**

- ___ The cost of membership is reasonable and provides value to me.
- ___ Our club uses grants and partnerships whenever possible.
- ___ Our club generates enough money to fund current and potential service projects.
- ___ The time spent raising money is reasonable for money raised.
- ___ Our club makes sound decisions on how and when we spend our money.
- ___ Our club creates a budget every year that aligns to our club's vision and goals.

___ **TOTAL****TOTAL SCORE:**



CLUB VISION GUIDE

PURPOSE: To help define your club's purpose and values — what it does and why it exists — and create a clear, concise vision to guide the decisions of club leaders and members. This vision will help your club deliver the “wow” that makes members enthusiastic about bringing other people into the club.

AUDIENCE: Board members and general membership. Club coach, where applicable.

FREQUENCY: Every 5 to 10 years — or any time the club or community has experienced significant changes or achieved their vision — set aside a meeting or two for members to discuss what your Kiwanis community is.

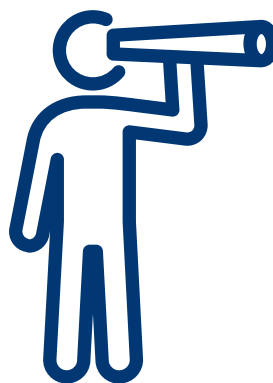
INSTRUCTIONS

1. Provide a printed copy of the club vision worksheet to each member. Give them three to four minutes to list the top five things they expect of an excellent club member. Individual input is important — it assures that everyone gets an equal voice.
2. Group members in teams of three or four to determine their top 10 expectations of an excellent club member (with about five minutes of deliberation).
3. Consolidate these expectations into a top five list. (Use an easel pad.) If you can only get the list down to seven to nine expectations, go on to what an excellent club does for their members.
4. Place the lists on the wall next to each other. Give time to resolve any conflicts or gaps.
5. Cross-reference both lists to ensure that the club supports the members — and the members support the club. For example, if members are expected to take leadership positions, the club needs to provide leadership opportunities.
6. After you've set expectations, keep them visible by posting and discussing the lists during meetings. Use the club newsletter and website to keep all expectations front-of-mind for members and club leaders alike.

YOU CAN NOW USE YOUR VISION TO:

Your club's vision is the front cover to your club's story. It needs to be used to focus your club activities within the community and guide your visibility efforts.

- Brand the club's identity. Custom logo requests are available at [kiwanis.org/branding-marketing](https://www.kiwanis.org/branding-marketing).
- Align your club's signature project with your vision. If it doesn't, you may want to rethink your vision or your signature project.
- Offer clarity to potential members and partnering organizations.
- Help the club set goals and priorities.
- Guide members and leaders toward decisions about service, fundraising and signature projects.
- Create a succinct way to describe Kiwanis when recruiting new members.





CLUB VISION WORKSHEET

TOP 5 THINGS WE EXPECT OF A MEMBER:

1. _____
2. _____
3. _____
4. _____
5. _____

TOP 5 THINGS A MEMBER EXPECTS OF THE CLUB:

1. _____
2. _____
3. _____
4. _____
5. _____

DEFINE OUR COMMUNITY

By defining the community we serve, we can focus on how to make an impact in our constituents' lives and clearly articulate our club's vision.



WHO do we want to serve?

1. **Age** (example: children under 5 years). _____

2. **Abilities** (example: wheelchair users). _____

3. **Socioeconomic conditions** (example: children who receive free lunch at school). _____





4. Others. _____

WHAT should the boundaries of our focus be? Consider:

1. **Geographical** — do other clubs share your geographical boundaries? (*example: San Jose city limits*). _____

2. **Socio-economic** (*example: area with subsidized housing*). _____

3. **Location of members** (*example: internet club with members around the world — each member's own backyards.*)

4. Others. _____

DEFINE OUR AREAS OF SUPPORT

What area of need does our club want to focus on? (*Examples: health, literacy, food and/or clean water insecurity, leadership development, etc.*)

How do we want to impact this area?



EVALUATE YOUR IMPACT GUIDE

PURPOSE: To look objectively at all your current and potential service projects and fundraising activities to determine the best ways to use your resources.

AUDIENCE: Board members and general membership. Club coach, where applicable.

FREQUENCY: Annually — or any time the club has experienced significant changes in its membership or service interests.

DETERMINE YOUR IMPACT: ANALYZE YOUR SERVICE

Use the following steps for an honest and thorough assessment of each service project your club does.

1. Make a list of all current and future projects. (Use information gathered from your **community survey** for additional service needs.)
2. For each project, determine its level of impact and compare it with the resources used.
3. Place each project in one of the four quadrants, based upon a frank discussion of whether each is high- or low-impact and high- or low-cost. (Be prepared for debate and disagreement.)
4. Brainstorm ways you can mitigate a project's cost and increase its impact.
5. Make the hard decisions on what you should continue to do, start doing and stop doing.

EXAMPLE

| | |
|---|--|
| <p>HIGH IMPACT / LOW COST</p> <p>This is your “sweet spot”— where you want the greatest number of your projects to be.</p> | <p>HIGH IMPACT / HIGH COST</p> <p>This is your signature project. Every club needs one of these.</p> |
| <p>LOW IMPACT / LOW COST</p> <p>Unless any of these are a pet project of a member, you would be better off handing these projects off to another organization.</p> | <p>LOW IMPACT / HIGH COST</p> <p>These are resource “hogs.” You need to enhance the impact and mitigate the costs for each one that you plan to keep.</p> |

EXAMPLE

EXAMPLE

| | | |
|---|---|----|
| Name of fundraiser: | | |
| Date / time of year of fundraiser: | Total costs: | |
| Gross income: | Time spent (in hours): | |
| Net profit / loss: | | |
| Estimated number of lives impacted: | YES | NO |
| VISIBILITY/INTEREST | | |
| Does this fundraiser support or promote our mission? | | |
| Does this activity educate the public about the Kiwanis mission? | | |
| Does this activity generate interest in the club and its activities? | | |
| Does the visibility generate interest in the club and after the event? | | |
| Does or could the club get media visibility before, during and after the event? | Visibility for club Rate 1-5 (5 is highest): | |
| Member interest Rate 1-5 (5 is highest): | How visible is the fundraiser — how much of the community does it involve? And how much could it involve? | |
| LEVEL OF SUCCESS? | | |
| Are there partnership or sponsorship opportunities? | YES | NO |
| Does it provide adequate revenue for projects? | | |
| Does it provide significant revenue compared with the volunteer hours? | | |
| Could the fundraiser be expanded or increased? | | |
| Would the fundraiser be more successful if the club had more members? | | |
| How could you increase the funds raised? | | |

FUNDING THE RIGHT FIT: ANALYZE YOUR FUNDRAISING

Use this chart to weigh the costs against the returns of potential and current fundraisers.



MEASURING YOUR CLUB'S READINESS: CREATE CLUB CHANGE

Give club members the results of the service and fundraising analyses so they get a full picture of the findings. (Also consider sharing the membership survey and community survey results.) Then encourage them to share their opinions and experience. Here are a few options for starting the conversation:

- Interview members individually.
- Use a member survey. (See the example in the **member survey**.) Online survey platforms can make the surveys anonymous.
- Conduct an open forum at a club meeting.
- Conduct a visual assessment in which observations and thoughts are compiled on a chart like the following. Or write them on sticky notes according to categories or questions.

These questions can help you make changes and improvements:

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

Based on the information you give them and the feedback they give, determine what changes they're willing to make. With confidence that you have the buy-in of all members, you can use the results of this exercise to develop goals in the club's strategic plan.

EXAMPLE

Now that you have taken a critical look at your service and fundraising, determine what changes your club needs to make in the upcoming year. The best way to do this is through a Stop, Start and Keep activity. This will help you identify the easiest areas to change, possible areas of resistance and how you can make room for more impactful results.

It is best if you can involve the entire club in this process. The more people who are involved, the better the "buy-in" and the more likely success will be.

| START | STOP | KEEP |
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DETERMINE YOUR IMPACT: ANALYZE YOUR SERVICE

Use the following steps for an honest and thorough assessment of each service project your club does.

1. Make a list of all current and future projects.
2. For each project, determine its level of impact and compare it with the resources used.
3. Place each project in one of the four quadrants, based upon a frank discussion of whether each is high- or low-impact and high- or low-cost. (Be prepared for debate and disagreement.)
4. Brainstorm ways you can mitigate a project's cost and increase its impact.
5. Make the hard decisions on what you should continue to do, start doing and stop doing.

| IMPACT FACTORS |
|--|
| <ul style="list-style-type: none"> • Number of lives touched. • Level of effect on recipients. • Duration of positive effect. • Club visibility. • Members' passion. • Recruiting impact. • Support generated in the community. |
| IMPACT ENHANCERS |
| <ul style="list-style-type: none"> • Reconsider recipient audience. • Add more visibility. • Target people with fewer advantages. • Consider age — the earlier the impact, the longer the effects. |
| COST FACTORS |
| <ul style="list-style-type: none"> • Money needed. • Hours required. • Number of members involved. • Time needed to organize. • Interest by members. |
| COST MITIGATORS |
| <ul style="list-style-type: none"> • Sponsors. • Partners. • Refreshing the event. • Donations. |



| HIGH IMPACT / LOW COST | HIGH IMPACT / HIGH COST |
|---|---|
| <p>This is your "sweet spot" — where you want the greatest number of your projects to be.</p> | <p>This is your signature project. Every club needs one of these.</p> |
| | |
| LOW IMPACT / LOW COST | LOW IMPACT / HIGH COST |
| <p>Unless any of these are a pet project of a member, you would be better off handing these projects off to another organization.</p> | <p>These are resource "hogs." You need to enhance the impact and mitigate the costs for each one that you plan to keep.</p> |
| | |





FUND THE RIGHT FIT: ANALYZE YOUR FUNDRAISING

If your club needs some inspiring ideas, check out [kiwanis.org/fundraising-ideas](https://www.kiwanis.org/fundraising-ideas).

| | |
|-------------------------------------|------------------------|
| Name of fundraiser: | |
| Date / time of year of fundraiser: | |
| Gross income: | Total costs: |
| Net profit / loss: | Time spent (in hours): |
| Estimated number of lives impacted: | |

| VISIBILITY/INTEREST | YES | NO |
|--|--|----|
| Does this fundraiser support or promote our mission? | | |
| Does this activity educate the public about the Kiwanis mission? | | |
| Does the visibility generate interest in the club and its activities? | | |
| Does or could the club get media visibility before, during and after the event? | | |
| Member interest Rate 1-5 (5 is highest): | Visibility for club Rate 1-5 (5 is highest): | |
| How visible is the fundraiser — how much of the community does it involve? And how much more could it involve? | | |

| LEVEL OF SUCCESS?? | YES | NO |
|--|-----|----|
| Are there partnership or sponsorship opportunities? | | |
| Does it provide adequate revenue for projects? | | |
| Does it provide significant revenue compared with the volunteer hours? | | |
| Could the fundraiser be expanded or increased? | | |
| Would the fundraiser be more successful if the club had more members? | | |
| How could you increase the funds raised? | | |





MEASURE YOUR CLUB'S READINESS: CREATE CLUB CHANGE

Use this Stop, Start and Keep activity to determine what changes your club needs to make in the upcoming year.

| START | STOP | KEEP |
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DEVELOP PARTNERSHIPS

PURPOSE: To help club leaders find ways to increase the club's impact, mitigate costs and create a more cohesive community.

AUDIENCE: Board members, general membership.

FREQUENCY: Annual — or any time the club has experienced significant changes in its membership or service interests.

CO-EXIST

Clubs that are connected have more opportunities. Here's how your club can get started:

- Reach out to government or business organizations that can help you identify who is working in your community.
- List the entities that your club is currently not doing business with in the "Co-exist" column of the tool.
- Research these entities. Do they have a vision or mission that complements your club's? Can they support your goals? Do you have a member or partner with a connection to someone who works there?

RELATIONSHIPS

Consider the following questions:

- Where have you purchased supplies for projects?
- To whom have you reached out for donations or sponsorships?
- To whom have you sold event tickets?
- Who has provided volunteers for projects?
- To whom have club members provided service hours?
- Who does your club support?
- Who has come to speak at club meetings?

List these entities under the "Relationship" column of the tool. How can you move the relationship into a partnership relationship? How can you provide them additional visibility by recognizing their support?

Use the results from **Evaluate your impact** tool for potential needs and opportunities.

PARTNERS

These are organizations or entities that your club has a long-term relationship with. Some you can name immediately — but don't forget to use the **Celebrate success** tool to help recognize your partners and strengthen that connection. And consider situations that can help you strengthen a partnership:

- A member of your club is on their board.
- They have a member in your club.
- You plan events together.
- You have connected them with a third partner.

Look at your previous lists. Who can you develop a partnership with? Based on your current club projects and target populations, who might you approach to ask about partnership? Use the **Community survey** tool results to help identify a good partner.

Sponsorships are an important part of many club fundraisers — don't forget to offer a free membership for a year to your most generous sponsors. To learn more about strong sponsor relationships, get our sponsorship toolkit at kiwanis.org/members-partners.

Use the results of this analysis in conjunction with the **Evaluate your impact** tool to enhance your club's operations. Any action identified in this process should be reflected in your goals within your Club Excellence plan.



DEVELOP PARTNERSHIPS

[illegible]



Look at businesses and organizations in your community. Then consider these questions:

Do you have a project or potential project that you could use to build a relationship?

Among organizations with which you already have a relationship, which could you approach about a partnership?

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

Have any nonprofits or nongovernmental organizations relevant to your cause been established within the last few years?

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

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



CLUB EXCELLENCE PLAN GUIDE

PURPOSE: To create a club plan for the next Kiwanis year. Successful clubs have goals, milestones and a plan to reach those goals. Every year, your club needs to determine what it wants to accomplish. A strategic plan can help — but if your club hasn't created one yet, you can still create a club excellence plan for the year.

AUDIENCE: Board members and general membership. Club coach, where applicable.

FREQUENCY: Annually, prior to October 1.

GOALS

Your leaders can create SMART goals for your club to work toward. We recommend three to five such goals per year. SMART stands for:

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

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

Action-oriented: Describe the actions you will take to achieve the result you want.

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

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

Not a SMART goal:

Increase the number of service hours provided to the community.

A SMART goal:

*Increase the number of service hours provided to the community **by 10% by September 30.***

THESE GOALS SHOULD:

- Give your club a high degree of confidence that they can be achieved.
- Have member support.
- Align with your club's vision.

To ensure your goals are achievable, list some ideas for goals. Evaluate your ideas according to the level of confidence leaders have in completing the goal. Then prioritize the goals using the letters A, B and C — with A representing the highest importance, and so on.





MILESTONES

Once the goals are established, determine the milestones you want to have along the way. Measuring progress can help keep morale high, and it encourages ownership of goals — giving you the opportunity to recognize committees and individual members. (Use the **Celebrate success** tool to plan for reaching milestones and goals.)

Remember to keep the goals visible throughout the year to members and club leaders — and track your progress to keep everyone focused. The **Club scorecard** tool is designed to help you with this.

WHAT DOES YOUR CLUB NEED TO ACHIEVE ITS GOALS?

Your club's committees should provide an avenue to execute your goals. Like the club, each committee should start the year with a plan. This sheet provides an outline for the plan that supports the overall club goals and vision.

One committee can often support multiple club goals. For example, if a club wants to increase its membership, the service committee might work with the membership committee to create an open house event at a service project.

Also consider the following ACE tools:

- If a sponsor or partner is willing to provide additional marketing or financial assistance to help your club achieve one of its goals, look at the **Develop partnerships** tool.
- If one or more of the goals involves fundraising, consider the tips in **Evaluate your impact**.

HELPFUL HINTS:

- Determine milestones toward your goals that you can celebrate when you reach them.
- Keep your goals visible: Display them and use charts or graphs to mark milestones at club meetings.
- Involve future leadership in setting goals.
- Get new members involved in action steps.
- Keep the approach fresh — try different ideas and take a few risks.
- Review progress toward club goals at each board of directors meeting.
- Celebrate successes often (monthly, at milestones, etc.).
- Recognize members who contribute to club achievement and success.





CLUB EXCELLENCE PLAN: CLUB GOALS

SPECIFIC • MEASURABLE • ACTION-ORIENTED • REALISTIC • TIME-BOUND



GOAL 1: _____

Target date: _____

Committees responsible: _____

Milestones to celebrate: _____

GOAL 2: _____

Target date: _____

Committees responsible: _____

Milestones to celebrate: _____

GOAL 3: _____

Target date: _____

Committees responsible: _____

Milestones to celebrate: _____





CLUB EXCELLENCE PLAN: COMMITTEE SUB GOALS



Each committee should fill out a goal sheet for each club goal they are supporting.

COMMITTEE: _____

GOAL: _____

SUB-GOAL: _____

Target date: _____

Person responsible: _____

Milestone reward: _____

SUB-GOAL: _____

Target date: _____

Person responsible: _____

Milestone reward: _____

SUB-GOAL: _____

Target date: _____

Person responsible: _____

Milestone reward: _____

SUB-GOAL: _____

Target date: _____

Person responsible: _____

Milestone reward: _____



CLUB SCORECARD GUIDE

PURPOSE: To track key indicators and reflect on them periodically, helping you focus on desired results — and determine where you may need to adjust your plan. A club's success depends on many factors — from administrative tasks to strategic planning and everything in between. You may track activity often, but if your club isn't getting the outcomes you need, it's time to make changes.

AUDIENCE: Board members and club coach where applicable.

FREQUENCY: Quarterly, at board meetings.

WHAT TO TRACK

Your club will create its own scorecard based upon your desired results. Here are suggested areas and activities to track:

MEMBERSHIP

- **Members:** Number of members on the roster. (Whether to include honorary members is your club's choice.)
- **Added/deleted members:** Tally of every new member you add or delete from the club roster.
- **Retention rate:** Percentage of members who started and completed the year with your club.
- **Diversity of members (gender/age/profession/ethnicity/etc):** Percentage of diversity compared to average members in your club.
- **Prospective members:** Number of guests who visit your club's events to learn more about your club.
- **Event participation:** Percentage of club members who attended club events. (May include service projects, fundraisers, special events and/or regular meetings.)
- **Trained membership committee:** Percentage of membership committee members who have attended training.
- **New member sponsors:** Which members are bringing in the most new members.
- **Tactics:** Which tactics you are using to recruit new members (e.g., Two For Two, open house, etc.).



LEADERSHIP & EDUCATION

- **Annual club plan:** Whether club leaders have a plan for your club's success during the Kiwanis year.
- **Strategic plan:** Whether your club has a current strategic plan that it's following.
- **Distinguished members:** Number of members who have met the Distinguished Member requirements in the current Kiwanis year. (Check the website for current criteria.)
- **Leaders trained:** Who among the president, secretary, board of directors and committee chairs has completed training prior to the start of their year of service.
- **Milestones celebrated:** Number of milestones your club has marked in pursuit of club goals.
- **Educational event attendance:** Percentage of club members who attend events other than your club's (division council meetings, district conventions, international events, etc.).
- **Election report completed:** Whether your club secretary has completed and submitted the club election reports on time.
- **Convention delegates:** Whether your club sent two delegates to vote in the House of Delegates at the Kiwanis International convention.
- **Succession planning:** Whether your club has a plan for a progression of leadership — especially for future presidents.
- **Leadership beyond the club:** Whether your club has members filling (or in line to fill) division, district and/or international offices.





SERVICE

- **Total service hours:** Number of service hours your club projects have required.
- **Service hours per member:** Number of service hours by the club divided by the number of club members.
- **New club sponsorship:** Whether your club has reached beyond the local Kiwanis community to create a new Kiwanis club.
- **Total service hours for non-Kiwanians:** Number of service hours given to your club's projects by people who aren't members of your club.
- **Joint events with partners:** Number of events your club has conducted with your partners (including projects or events with Service Leadership Programs).
- **Number of children reached:** Number of children who have benefited from your club's service.
- **Involvement with Service Leadership Programs:** Number of club members who interact with your sponsored SLPs.



FINANCIAL VIABILITY

- **Financial review:** Whether members (other than the treasurer and members of the Finance Committee) conducted the required annual financial review. (Review your club bylaws for specific rules.)
- **Dues paid on time:** Whether your club secretary remitted the required dues payment to the Kiwanis International office on time.
- **Fundraising money earned:** How much money your club has earned (including interest on investments).
- **Fundraising money spent:** How much money your club has used or donated for service work.
- **Treasurer training:** Whether your treasurer took advantage of online training prior to their year of service.
- **Grants:** Amount of funds brought into the club through partnerships, donations and grants.
- **Local laws:** Whether your club is following all local and national laws, regulations, etc., including annual filings or registrations.



VISIBILITY

- **Media placements:** How often your club or projects were mentioned in the news media, on social media sites, etc.
- **Website visits:** Number of unique clicks there have been on your website.
- **Social media:** How often you post club events on social media and how many interactions you get from them.
- **Community event participation:** How often your club members (as a group) represent Kiwanis at community events.
- **Unsolicited prospects:** Number of guests who visited your club events without being invited by a member.
- **Members on partner boards:** Number of members connected to the community through active participation on local partners' boards.
- **Signature project:** How much visibility your club gets from its signature project (e.g., "likes" on social media/partnerships/members/media mentions).





CLUB SCORECARD

Include the activities your club needs to track throughout the year.

| MEMBERSHIP | | | | | | |
|------------------------------|--------|---------|---------|---------|----------|--------|
| Average member survey score: | | | | | | |
| | Oct. 1 | Dec. 31 | Mar. 31 | June 30 | Sept. 30 | Target |
| Number of total members | | | | | | |
| | | | | | | |
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| LEADERSHIP & EDUCATION | | | | | | |
|---|--------|---------|---------|---------|----------|------|
| Average member survey score: | | | | | | |
| | Oct. 1 | Dec. 31 | Mar. 31 | June 30 | Sept. 30 | Goal |
| Members attendance at training sessions | | | | | | |
| | | | | | | |
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| SERVICE | | | | | | |
|------------------------------|--------|---------|---------|---------|----------|------|
| Average member survey score: | | | | | | |
| | Oct. 1 | Dec. 31 | Mar. 31 | June 30 | Sept. 30 | Goal |
| Service hours per member | | | | | | |
| | | | | | | |
| | | | | | | |
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| VISIBILITY | | | | | | |
|-------------------------------|--------|---------|---------|---------|----------|------|
| Average member survey score: | | | | | | |
| | Oct. 1 | Dec. 31 | Mar. 31 | June 30 | Sept. 30 | Goal |
| Social media likes and shares | | | | | | |
| | | | | | | |
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| FINANCIAL VIABILITY | | | | | | |
|------------------------------|--------|---------|---------|---------|----------|------|
| Average member survey score: | | | | | | |
| | Oct. 1 | Dec. 31 | Mar. 31 | June 30 | Sept. 30 | Goal |
| Fundraising money earned | | | | | | |
| | | | | | | |
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HOST POTENTIAL MEMBERS GUIDE

PURPOSE: To give your club steps for determining your readiness for recruiting and welcoming new members. It is important for your club and your members to periodically look in the mirror and see if you are ready for quests and new members.

AUDIENCE: Club members and membership committee.

FREQUENCY: Annually — and any time before a membership event.

STEP 1: SELF-EVALUATION

Use the character cards in the online club toolbox. Discuss how any of these people would feel joining your regular club meetings, service projects or fundraisers.

- What situations would make them comfortable?
- Do club members act in a way that is welcoming to newcomers?
- What are some member habits

or club traditions that may seem strange to them?

Of course, you can also ask these questions about your potential new members.



STEP 2: MYSTERY SHOPPER

While putting yourself into someone else's shoes is beneficial, there's nothing like feedback from an actual potential member. Find someone who matches the demographics your club wants, and ask them to visit one of your meetings, projects, fundraisers or social events. Afterward, provide them with the guest feedback form to capture their impression of the club. You could end up with new insights into how your club needs to improve — and maybe even with a new member!

STEP 3: PREPARATION

Based on the feedback from your own members — and a potential member or two — you can determine your next steps for improving your first impressions:

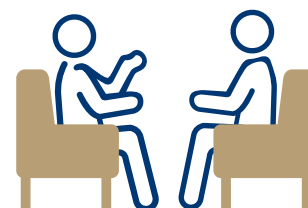
- Assign club members to oversee guest relations: greeting guests, introducing them to others and following up after the visit.
- Discuss best practices for hosting potential members.
- Pair every member with an "accountability buddy" to keep them aware of any potential guests. (Sometimes you can get absorbed in conversation with your club friends and forget that other people are there.)



- Make sure you have a backup for every assignment in case the person in charge isn't there.

STEP 4: ENHANCE YOUR HOSTING

Put your hard work into practice. The Two For Two program (kiwanis.org/twofortwo) is a great way to practice on one or two guests at a time. Remember to evaluate how well you did and discuss how improvements can be made.



Once you're accustomed to hosting one or two potential members at a club meeting, you can use the **Host an open house** resource to invite a large number of potential members. Don't forget to use the **roster/skills analysis resource** to help create that list of invitees. And have your club's nominating committee recommend future leaders in the community to invite.

STEP 5: EMBRACING YOUR NEW MEMBERS

Just because they joined, doesn't mean you should stop being a good host. A good club keeps people engaged, active and coming back for more — by keeping its "I's" on new members:

- **Introduce** the potential member to what it means to be a member of your club.
- **Induct** the new member into the club with an official ceremony. kiwanis.org/club-toolbox
- **Inform** the new member with an orientation session about your club, Kiwanis and how they will play a part. kiwanis.org/club-toolbox
- **Involve** the new member in different aspects of the club by using the "buddy system," inviting them to participate on committees, attend events and more.
- **Integrate** them into the leadership pipeline, where they'll learn more about the club's membership, operations and impact in the community.





- **Invest** in their education as Kiwanians — and leaders — by sending them to division, district and international training events. [kiwanis.org/convention](https://www.kiwanis.org/convention)
- **Inspire** them by recognizing and rewarding them for sharing their time and skills with your club and community. For ideas, use the **Celebrate success** tool.

Keep an “I” on long-term members by invigorating them — with a challenge to start something new and to mentor newer members.

STEP 6: REPEAT

Never rest on your laurels. Go back to Step One and start the process again. Practice will take your club to the places you have only dreamed about.





HOST POTENTIAL MEMBERS WORKSHEET

SELF-EVALUATION

Based upon the character profiles you were given, how do you think guests would feel at your club:

1. What situations would make them comfortable? _____

2. Do members act in a way that is welcoming to newcomers? Examples? _____

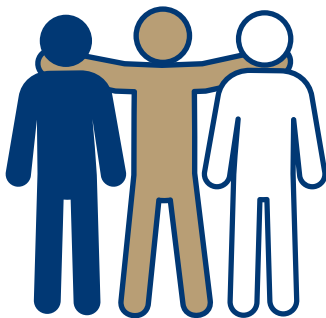
3. What are some member habits or club traditions that may seem strange to them? _____

4. What projects or activities would ignite their passion? _____

PREPARATION

Assign roles for members at club meetings and events to do the following (coordinate assistants/ accountability buddies for each member and their role):

- Greeter _____ Assistant greeter _____
- Introducer _____ Assistant introducer _____
- Follow-up _____ Assistant follow-up _____





EMBRACING NEW MEMBERS

List ways your club does and can do the following to keep the membership experience strong:

INTRODUCE

INDUCT

INFORM

INVOLVE

INTEGRATE

INVEST

INSPIRE

INVIGORATE





GUEST FEEDBACK

Thank you for attending our Kiwanis meeting! Please provide your feedback.

| RATE EACH WITH A CHECK MARK (1 = very negative, 4= very positive) | 1 | 2 | 3 | 4 |
|---|----------|----------|----------|----------|
| Meeting place was easy to find. | | | | |
| Venue provided for a good meeting place. | | | | |
| Impression of initial greeting and how welcome you felt. | | | | |
| Meeting and what to expect were explained to you. | | | | |
| Meeting was organized. | | | | |
| Meeting was relevant to you. | | | | |
| Kiwanis International was explained to you. | | | | |
| If materials about Kiwanis were provided to you, please rate them. | | | | |
| Overall impression of Kiwanis. | | | | |

GENERAL FEEDBACK:

Did you feel welcomed and included? _____

If not, why not? _____

What did you like best? _____

What did you like least? _____

Would you consider joining Kiwanis? _____

Other thoughts/comments? _____



CELEBRATE SUCCESS GUIDE

PURPOSE: To ensure that recognition and celebration happen — by helping you plan for it. People get involved when they know they're doing something meaningful. They stay involved when their efforts are recognized. What gets recognized gets repeated. Some celebrations may require more planning than others, but every one of them is important.

AUDIENCE: Entire club.

FREQUENCY: Ongoing.

HOW WILL YOU CELEBRATE SUCCESSES?

Whether it's for members of your club, partners or multiple groups, there are many ways to celebrate. Choose the right way for each occasion.

BIG EVENTS:

- Community-wide picnics.
- Festivals.
- Galas.
- Annual banquets.

SMALLER EVENTS:

- Cocktails before a large event.
- Recognition night.
- Volunteer of the year.
- Special meetings for particular professionals (e.g., fire fighters, police, clergy, etc.).
- A "community hero" night with a special guest list.

GIFTS/ACTIONS:

- A donation in the honoree's name.
- Lifetime membership to Kiwanis International.
- Nomination for a community award.
- Submission to be highlighted on a community profile page.



IMPROMPTU OPPORTUNITIES:

- Thank you notes.
- "Shout-out" at the start of a meeting.
- A mention on your website and/or social media pages.
- Send balloons or cupcakes to their place of employment. (Also boosts club visibility.)
- Present a small gift from the Kiwanis Family Store.
- Silly gifts (e.g., popcorn because "their name keeps popping up").
- Plan a social get-together.

Of course, it's always good to simply say, "Thank you" and "You are appreciated" — in addition to any gesture or act of recognition.

WHO & WHAT DO YOU RECOGNIZE?

- Milestones set out in your Club Excellence Plan tool.
- Members or other volunteers who are always there when you need them.
- Partners and sponsors who help make projects and activities happen throughout the year.
- Service Leadership Program members.
- Community members who share your mission or vision.
- Winners of any competition for achieving club goals.
- Your club's successful fundraising effort, service project, membership drive, etc.

PLAN YOUR RECOGNITION

Make sure you have enough money in your operating budget to recognize everyone throughout the year. Then assign people to make it happen — and make sure they know they're in charge.



FOR EACH RECOGNITION OPPORTUNITY, ASK AND ANSWER THESE QUESTIONS:

- Does this need a special location? Permits?
- Who needs to be involved?
- Who needs to know? When?
- What is the budget? What are the costs?
- How can you involve partners?

Always be on the lookout for recognition opportunities. When you thank people for helping your Kiwanis club and improving the community, you help ensure that they will keep doing it!

HELPFUL TIPS:

- The bigger the event, the more people and time you'll need to succeed.
- For small thank-you gifts, make sure you have room in your budget.
- Get input from multiple people regarding who and what to recognize.
- Take advantage of dignitary visits to heighten the prestige of any recognition.
- Personalize all your recognitions — nobody wants to be just one of many.
- Tag on to other special events in the community or worldwide events like International Children's Day.

SHOWCASE YOUR CLUB AT ALL PUBLIC EVENTS

Whenever you have a chance to showcase your club with a table, make sure it adds the elements of celebrating the community, showing off and inviting others. Tell your club's story with a showcase exhibition. Seeing your club showcased at community events allows your members to celebrate their membership in your club. For more tips, read the **effective tabling** resource.

Here are a few ideas:

Photos: Select 10 to 15 photos (depending on the size of the location and the expected crowd). Include service projects, fundraisers and fellowship moments. Enlarge the photos for more impact and consider adding captions or descriptions. Choose action photos instead of "grip and grin" shots.

Key items: Display your club's story. For example, include a T-shirt from a recent walk-a-thon, an invitation to a fundraiser or a certificate from the mayor thanking your club.

PowerPoint: Prepare a presentation of your club's best photos. It could loop before the event or during a social time.

There's no limit: Your club showcase exhibition will tell your story in a unique way. It should serve as a conversation starter — so make sure club members are ready to share Kiwanis stories.

Embrace social media: Profile club members on the social media pages. Include a quick video of them saying why they like Kiwanis, etc. If they win a big award, send a photo/media release to the media outlet highlighting their success with whatever they did.



FIND THE ACE TOOL YOU NEED

Achieving Club Excellence (ACE) tools help you look at all your club does — from operations and fundraising to service and community outreach. You can find the ACE tools you need based on this common list of concerns. Each tool is available online at kiwanis.org/ACEtools.

| CONCERNS | TOOLS THAT CAN HELP |
|--|--|
| Members of your club seem less engaged. | <ul style="list-style-type: none"> • Member survey • Club vision • Celebrate success |
| Your club needs new ideas for recognizing individual and club accomplishments. | <ul style="list-style-type: none"> • Celebrate success |
| Your members have ideas, but nothing seems to happen. | <ul style="list-style-type: none"> • Club vision • Club excellence plan • Club scorecard |
| Your club wants to become more visible in the community. | <ul style="list-style-type: none"> • Evaluate your impact • Develop partnerships • Celebrate success |
| Your club's annual fundraiser is becoming less successful. | <ul style="list-style-type: none"> • Community survey • Evaluate your impact • Develop partnerships |
| Your club's signature project is losing member interest. | <ul style="list-style-type: none"> • Member survey • Club vision • Evaluate your impact |
| Your club has ideas but needs direction or goals. | <ul style="list-style-type: none"> • Community survey • Evaluate your impact • Club excellence plan • Club scorecard |
| Your club is unsure of its purpose in the community. | <ul style="list-style-type: none"> • Community survey • Club vision |
| Your club is losing members. | <ul style="list-style-type: none"> • Member survey • Club vision • Club excellence plan |
| Members can't decide which organizations to support. | <ul style="list-style-type: none"> • Community survey • Club vision • Evaluate your impact |
| You have membership events and guests, but no one is joining. | <ul style="list-style-type: none"> • Club vision • Host potential members |
| Your club struggles to find new leaders. | <ul style="list-style-type: none"> • Member survey • Community survey • Host potential members |
| Your club's projects require more members than you currently have. | <ul style="list-style-type: none"> • Community survey • Club vision • Evaluate your impact • Host potential members |