



New Club Follow-Up Program

Introduction

Whether traditional, virtual, happy hour, special needs, college club, club within a club, sports club, or other type of club, New Clubs should be built to last. This program is an easy way to help New Clubs be successful. Although the requirements presented here are geared toward a traditional club, the concepts apply to all types of clubs and can be modified to fit specific circumstances of the New Club.

This handbook has been developed to help a Sponsor Club and District leaders fully complete the New Club Follow-Up program with special emphasis on different phases. The goal is to ensure that the New Club will be strong and sustainable for years to come!

Once the club is formed, a sponsor Club has specific additional responsibilities. The New Club Follow-Up is a phased program which should be carried out during the first two years (minimum) of the life of the New Club. The Orientation Phase must be carried out during the first three months of the New Club's life. The District leadership, together with the Sponsor Club, continue to be responsible for the follow-up for the remaining 2 years, at least.

Who are the parties in this follow-up? Builders of Excellence, Sponsor Club Presidents, Sponsor Club Secretaries, Sponsor Club Treasurers, Lieutenant Governors, Governors and Governor-elects, Other Clubs in the Zone, New Club Building Chairs, Membership Chairs, Leadership Development Chairs, and International Vice Presidents.

Phase I Orientation

The Board of Directors of Optimist International has directed that New Club building credit and awards will be given for the project only when the Orientation Phase of this follow-up program has been completed successfully and certified by The District Governor, or other responsible District officer, as well as the Charter President of the New Club, and the Optimist International Field Representative.

The Orientation Phase for clubs built in the 4th quarter of the Optimist year could last through December. In such cases, credit for those clubs will be given in the year built.

The major components to the New Club Follow-Up Orientation Phase which must be provided by the Sponsor Club are as follows:

1. Three orientation programs presented by the Sponsor Club, one during each of the New Club's first three months
 - a. Orientation to Optimism Series on YouTube or the Learning Management System (LMS) (for all members)
 - b. New Club goals (for all members)



- c. Membership matters (for all members)
2. Attendance at 1 district meeting by two charter officers of the New Club, preferably the president and the secretary treasurer.
3. Assist the New Club in planning at least one service project.
4. Assist the New Club in planning at least one fund raising project.
5. Assist with New Club Officer training on the LMS and logging into Optimist Leaders website
6. Assist New Club with proper incorporation in their state or province or other locale
7. Assist New Club with adopting an annual budget
8. Assist New Club secretary / treasurer with completion of records including setting up email

The Orientation Phase is of utmost importance. Viewing the Orientation to Optimism series, together with informative and qualified speakers, all play a major role in familiarizing the charter membership with District and International procedures and services. Experienced guidance will help the New Club in the selection and planning of early activities, that is, community service projects and fundraising projects.

Goals Assistance

Developing goals and an agenda of community services and youth activities must be an early consideration and a Sponsor Club renders a tremendous service by helping a New Club plan its first service project. Early objectives should include both short term goals and long term goals.

An activity requiring limited finances and providing early involvement by most charter members will go a long way toward developing a community image for the New Club. At the same time, charter members begin to realize that they do in fact have some new important responsibilities within their club and within their community.

Raising funds needed to sponsor other community and youth-serving activities can be a big challenge for the New Club. One of the major contributions a Sponsor Club can make is to help the New Club plan its first fund-raising activity.

Club gatherings should also emphasize the importance of fun, enjoyable experiences where camaraderie abounds. Social events should be considered.

District Meeting Attendance

Attendance at Zone and District events opens the door to Optimist Fellowship which is a vital contributing factor for a viable Club. District meetings offer New Club officers and members an opportunity for recognition. They also provide an ideal setting for sharing and exchange of valuable information. Optimists who attend their first District function are eager to return. District leadership should consider an incentive to encourage members of the New Club to attend District meetings.



Seasoned Optimists do play an important role in the early life of a new Optimist Club. As a Sponsor Club, you should give your best toward a successful follow up. Members of the sponsor's leadership team should visit with their counterparts in the New Club as often as necessary. Maintain close contact with your New Club. Be available to help and assist. Make sure the follow-up is progressing smoothly. If you encounter problems or weaknesses, you might make helpful suggestions.

The guidance presented by Optimist International in this Follow-Up Program is just another of the many ways through which Optimist International attempts to ensure the success of every Club. Remember, you, the District leadership, play a major role in assisting the New Club and getting it started on the right track. Of course, this also requires involvement of the members of the Sponsor Club, allowing those members to become engaged with the New Club.

ORIENTATION PHASE DETAILS

The Sponsor Club should remember to act in a positive manner at all times, including providing valuable motivation to the New Club. The Sponsor Club should act in an advisory capacity rather than a critical one, being open and encouraging to the goals set by the New Club. The Sponsor Club should set a good example for the New Club by following the suggested standard meeting agenda. As noted previously, the elements in this program are generally geared toward traditional clubs. If the New Club is a non-traditional Club, the agenda would have to be modified appropriately.

The Sponsor Club will select knowledgeable speakers for at least three meetings of the New Club during the first three months of its operation. These meetings should cover the following topics, in the order listed. Members who are well-informed and experienced in the topic being discussed are good possibilities. District chairs and international officers would also be good choices as speakers.

Remember to be sure that meetings are fun and engaging!

First Membership Meeting: The general topic is orientation to Optimist International (OI)

- Vision of Optimist International.
- Purposes of Optimist International.
- Mission of Optimist International.
- The Orientation to Optimism series on the LMS is a great resource for this.
- Touch on the structure of the organization noting that the club is the foundation. Discuss the role of the club in the Zone, District, and International organization.
- Note that the first job for all members is to recruit a new member.



- Mention the value of going through the Personal Growth and Involvement (PGI) and Professional Development Program (PDP) programs.
- Explain the need for the board to meet separately from the general membership meetings. Remember, everything must be approved by the board.
- Explain the resources available at <https://optimist.org/> .

New officer training: for president, vice president, secretary, treasurer, OI Foundation Representative, and board members. District officers, mentors, and members of the Sponsor Club should assist with this. Be sure all officers and directors are comfortable with logging into Optimist Leaders online and the Learning Management System (LMS).

Communication tools: club email should be established, as well as other communication tools as determined by the membership.

Second membership meeting: General topic is the New Club’s goals.

- Long term and short term goals.
- Community and youth service programs and projects.
- Fundraising projects.
- Club financial structure and budget.
- **Emphasize that every project is an opportunity to recruit new members.**

Service & fundraiser projects outline

Project Name
 Date & venue
 Goal
 Number of club members involved
 Were community members involved?
 Outcome of project
 Was the goal met?
 If not, why not?
 Would the club repeat the project?

Sample initial balanced budget

<u>Income</u>	
Dues (20 members @ \$100 each)	\$2000
Fundraisers	<u>\$4000</u>
Total income	\$6000
<u>Expenses</u>	
Dues to OI & District (20 members @ \$80)	\$1600
Service Projects	\$3600
Expenses related to fundraisers	\$500



Marketing	\$100
Postage	\$100
Copies	<u>\$100</u>
Total expenses	\$6000

3rd membership meeting: The general topic is all things related to membership.

- Fellowship - Here the Sponsor Club should emphasize the importance of having fun meetings to promote fellowship and attendance at meetings.
- Growth strategy - Note that it is important to try to always be recruiting new members because as we know many hands make light work of all the projects.
- Communication - Stress the importance of communicating with all members through various methods. Consider setting up social media accounts at this time.
- Programs - Also mention that the planners for the different membership meetings in the future should include interesting programs and presenters.
- Agendas - important as they guide the meeting and serve as a tool to remind the leaders of the important points they want to cover. As previously mentioned, the following agenda is based on a traditional club. If the New Club is a non-traditional club, the agenda will need to be modified appropriately.

Sample Meeting agenda (allow 1 hour for the meeting)

Call to order
Pledge of Allegiance
Meal service
Introduction of Guests
New member induction & introduction
Brief business session
Program
Closing announcements
Optimist Creed & adjournment

The orientation phase must be completed during the first 3 months of the life of the New Club. Certifying completion of all of the above items, via the New Club Follow-Up Report as provided later in this handbook will entitle the Builder of Excellence, Sponsor Club, Zone, and District to receive Awards credit for a successful New Club building project.

Phase II First Year Follow-Up

New Club support continues beyond the Orientation Phase. In fact, it continues for at least 2 years. Two main objectives for this continued assistance are 1) to assist the Lieutenant



Governor and the Sponsor Club by providing additional District expertise; 2) provide a picture of the New Club's needs, health, and stability at that moment in history when a District representative visits the club. This will provide the District representative a time to offer encouragement and to answer questions that every New Club has.

As you work through the New Club Follow-Up Phases there should be few problems within the New Club. If by chance a New Club has mentioned, or someone has observed, anything such as inactive membership; poor attendance at club gatherings; debate oriented; no meals; no programs; no collection of dues; not meeting regularly; or committees are inactive or maybe even not even named, then these follow-up steps can be critical to the success of the New Club. The mentors, assisted by other District representatives, can support the Lieutenant Governor by filling vacancies in committees, offices, or even initiate procedures to proactively assuage potential problems. The mentors are encouraged to visit the New Club unannounced on a regular basis. The District representative will be able to provide encouragement, stimulate the New Club along an upward path, discuss current events and needs, moderate a brainstorming session on activities and fundraising or simply to answer questions.

Sponsor Clubs and District officials are encouraged to assist all concerned. The objective is a successful program enabling a successful New Club. The Lieutenant Governor should set up informal visits between the New Club and other clubs in the zone. Social events are encouraged.

FIRST YEAR DETAILS

90 Day Follow-Up:

- If not previously done, mentors should be identified for the New Club and these mentors should assist with and attend about 75% of the New Club meetings, activities, and projects now and through the entire first year. Some of the mentors should be from the Sponsor Club and some from the District.
- The mentors should also visit the New Club meetings and some projects unannounced - this will help provide a clear picture of the status of the club.
- The mentors should assist with incorporating under the not-for-profit requirements of their respective state or province, (or country)
- Confirm that the Federal Tax Identification Number (US Clubs) or similar tax numbers for clubs in other countries has been obtained by the Club.
- Ensure the New Club is having regularly scheduled meetings - are members attending and has the New Club been visited by District officers and the Lt. Governor?
- Encourage members to attend Zone and District meetings.
- Is the OI roster up to date? Are new members being added? Are exit interviews being conducted for members who drop?



Additionally, the mentors and Sponsor Club should confirm that all New Club committees are staffed. Builders of Excellence could provide assistance here. Are the New Club officers attending the Zone meetings? General evaluation of Club effectiveness (poor, good, or excellent?). What is the average attendance at club meetings? What is the average attendance at Club events? Are club members making interclub visits? Are other clubs in the Zone visiting the New Club? Rate the quality of bulletins and other forms of communication. Is the Club having speakers? What is the general stability of the club? Where is information or reorientation needed? How do you rate the New Club leadership? Is the New Club Board of Directors satisfied with dues collection? Has the New Club set up ACH Debit Authorization with OI so that the dues are automatically sent to OI?

Mentors should review their visits and the New Club's most important needs with the Lieutenant Governor and Governor. Identify areas for encouragement and recognition. How will you, the Sponsor Club, and you, the mentor, follow through?

180 Day Follow-Up:

- The Sponsor Club and mentors should be focusing on community service activities that the New Club has already done and encourage them to plan more.
- And the same is true for fundraisers.
- Social activities should be encouraged for club members.
- Again, the membership and especially the officers should have had some training sessions.
- Be sure to encourage all members to continue to invite new members to join the club. If the club has not already done so, New Optimists Welcome (NOW) or Welcome Optimists Worldwide (WOW) event or events should be happening. This includes reminding the New Club that every event is an opportunity to recruit new members, and as such flyers and new member applications should be readily available.
- The New Club should be developing a growth strategy, such as for every member dropped, 2 new members should be added.
- Members, and especially officers, should be encouraged to visit other clubs in their Zone.

Now is the time for the mentors to know whether the New Club is experiencing any problems. If so, what are the problems? Have officers or committee chairs changed? Is the club actively contacting inactive members? What help does the New Club need and how will you, the mentor, follow up?

270 Day Follow-Up:

- During this time, the mentors should encourage the New Club to try to be an Honor Club and participate in the current Awards programs offered by OI.



- If the club has not yet held a NOW or a WOW event, they should do so now. The Sponsor Club should assist with this.
- Have the current officers been mentoring their own members to become officers in their own club? It is never too early to encourage members to be ready to step into leadership positions for the next year so there are no repeats.
- Mentors should assist with holding officer elections and completing the Club Officer Elect Report (COER) timely, if necessary.
- Is the club aware of resources available from optimist.org, LMS, and OI, including the different committees?
- Are members of the club involved with the PGI or PDP?
- Is the club aware of different filing deadlines required by their state/province and federal governments, as well as the various filing deadlines for OI?
- The mentors should continue to visit the club, unannounced, and the Sponsor Club should continue to support the New Club at its meetings and activities.
- Are club members attending Zone and District meetings?

The mentors, Sponsor Club, and District representative should by now know whether the New Club is healthy financially. Does the New Club have good programs? Does the New Club have balanced activities? Does it have a feeling of pride, fellowship, and common loyalty [esprit de corps]? Can the New Club identify future leaders? Do the current officers need help in any area? Again, if there are any struggles, now is the time to assist the New Club.

360 Day Follow-Up:

- This is the time to remind the New Club to hold orientation for its incoming officers and committee chairs and if they have not done so, to have some planning sessions for next year's projects and activities, to be presented to the board of directors for approval. Builders of Excellence could help here.
- If there are known problems within the New Club, they should be addressed now. The mentors should offer their assistance in this area.
- By now the New Club should have established regular types of communication channels for their members.
- Is the New Club current on all its dues? This is much easier if they choose to have the dues automatically come from their checking account.
- Are New Club officers and members attending other clubs, Zone meetings, and District Meetings? Are the Lt. Governor and other District officers visiting the club?
- If problem areas exist, how will you, the mentor, assist? In general, the Sponsor Club, the District, and the mentors should be taking all steps necessary to ensure that the New Club is sustainable for years to come.



- At the end of the first year, the District might consider providing a 1st anniversary certificate to the New Club at a District meeting

Phase III Second Year Follow-Up

During the 2nd year:

- There is a strong need to extend the contact and service to New Clubs for a long period of time.
- The District Governor should continue to involve the New Club's leaders in District meetings so that they are sure to attend. By doing so, other members of the New Club are quite likely to attend, and they should be encouraged to do so.
- The District should offer some type of incentive to the officers of the New Club to attend District Conferences.
- The Governor should make some type of special recognition or presentation for members of the New Club attending District meetings.
- The Governor should try to attend a New Club activity
- The New Club should be encouraged to continue to expand its membership.
- The New Club should have held at least three service projects and one fundraiser, with the assistance of the Sponsor Club, by the end of the second year. What were they?
- Are the Board and Committees of the New Club active?
- Mentors should continue to assist with the New Club and check in on them at least once a quarter.
- Are all reports being submitted timely, both to OI and to the New Club's state or province? Do the Secretary or Treasurer need assistance/training?
- The District officers and mentors should continue to assist the New Club in holding officer elections, if necessary, and provide new officer training.
- Is the New Club continuing to mentor potential officers and committee chairs?
- The New Club should complete a Club Fitness Assessment at the end of the 2nd year.
- The mentors should assist the New Club in reviewing the New Club's bylaws to make sure they are compliant with the current OI Club standard club by-laws; a review that is done annually.
- The mentors and District leadership should be available to assist if any problems are noted.
- Also, toward the end of the 2nd year, the New Club should conduct another WOW event.
- The Governor should remind all clubs in the New Club's Zone to continue to support the New Club by assisting with their service projects and fundraisers.

FOLLOW-UP WHOSE RESPONSIBILITY IS IT?



The follow-up process is an on-going process which is *at minimum a 2-year commitment*. Led by the District, the care shown by all parties will ensure that each New Club becomes a strong, viable asset with effective leadership which provides excellent service to the youth and to the community for years to come. The ideas discussed here not only encompass suggestions for good club administration but will help us to bring out the best in the New Club, the Sponsor Club, and the District!

Whose job is it the charter year, 1st and 2nd years following?

All Builders of Excellence
Sponsor Club President
Sponsor Club Secretary
Sponsor Club Treasurer
Lieutenant Governor
Other Clubs in the Zone

Governor and Governor-elect
New Club Building Chair
Membership Chair
Leadership Development Chair
International Vice President

We gratefully acknowledge the volunteers who first developed this concept of club building follow-up several years ago.





Club Name:

Club Fitness Assessment

ITEM	SCORE RANGE	SCORE
How many Members in the Club?	< 10 = 4, 10 – 19 = 1, 20 or more = 0	
When was the last time a new Member was added?	>3 YRS = 3, < 2 YRS = 1, < 1 YR = 0	
When was the last time a Member was dropped?	>3 YRS = 3, < 2 YRS = 1, < 1 YRS = 0	
How many consecutive years has the current President been president?	>2 YRS = 3, 2 YRS = 1, <1 YRS = 0	
What percentage of the Members attend the regular meetings?	< 25% = 3, 25% - 40% = 1, >40% = 0	
Does the Club have an annual membership recruitment event?	No = 4, Yes = 0	
Does the Club do at least three youth/community programs each year?	No = 1, Yes = 0	
Does the Club have annual fundraisers to meet the needs of the service programs?	No = 1, Yes = 0	
Does the Club pay their Optimist International and District dues on schedule?	No = 1, Yes = 0	
Does your Club have a monthly communication out to your membership?	No = 1, Yes = 0	
Did your Club reach Honor Status last year?	No= 1, Yes = 0	
Total Club Score		

Score Results:

0 to 4

Club may be fit (but still room to improve)

5 – 8

Yellow Flag (Look for opportunities to help Club)

9 or more

Red Flag (Club needs immediate help)





NEW CLUB FOLLOW-UP TRACKING

ORIENTATION AND TRAINING	DISTRICT MEETING ATTENDANCE	FIRST YEAR FOLLOW-UP	SECOND YEAR FOLLOW-UP
<p>1. <u>1ST ORIENTATION MEETING</u> <i>For All Members</i></p> <p>Topic - Welcome to Optimism Items to be covered:</p> <ol style="list-style-type: none"> a. Explanation of Organization b. How the Club plays a role in the zone c. How the Club plays a role in the District d. Opportunities available to the Club through the District e. Opportunities available to the Club through International f. Opportunities available to the Member through the PGI and PDP program g. 1st job for all Members is to recruit a new member <p>2. <u>NEW OFFICER TRAINING</u> <i>For President, Vice Presidents, Secretary, Treasurer and Board Members</i></p> <p>3. <u>2ND ORIENTATION MEETING</u> <i>For All Members</i></p> <p>Topic - Club Goals Community Service Projects See Details </p>	<ol style="list-style-type: none"> 1. Date & location 2. # of Club Members attended 3. Were Club Funds provided for Members to attend District Conference? (Could be an incentive from the District) <p style="text-align: center;"><u>SERVICE PROJECT</u></p> <ul style="list-style-type: none"> • Project Name • Date & Location • Goal of Project • # of Club Members involved • # of other Members involved • Outcome of Project • Was Goal of Project met? • If not, why not? • Would Club repeat project? 	<p><u>60 DAY FOLLOW UP</u></p> <ol style="list-style-type: none"> 1. Determine a Mentor or Mentors for the New Club. (Mentor(s) should be around for about 75% of Club meetings & Activities during first year) 2. Not for profit incorporation completed? 3. Received Federal Tax number? 4. How many Club members attending Zone meetings? 5. Club having regularly scheduled meetings? 6. Has Club been visited by District officers other than Lt. Governor? If so, who visited? 7. How many Charter members have dropped? 8. How many new members have joined? <p><u>180 DAY FOLLOW-UP</u></p> <ol style="list-style-type: none"> 1. What Community Service activities have the Club done and what is being planned? 2. What fundraisers have been held or are going to be held? 3. What type of social activities has the Club had for the members? 4. Has there been any training sessions provided for Club Members? 5. Is there a growth strategy in place and is it effective? 6. Club should run a NOW or WOW program by this time. 7. Club members should visit at least one other Club in their zone. 	<p><u>DURING SECOND YEAR</u></p> <ol style="list-style-type: none"> 1. Governor of District should involve new Club's leaders at District meetings so they attend. 2. Encourage new Club to expand to at least 18 Members. 3. Encourage new Club leaders to attend at least 3 of the 4 quarterly meetings. 4. Encourage all Members of new Club to attend at least one of the District meetings. 5. District should offer some type of incentive to new Club Leaders for attending District. 6. District Governor should be encouraged to make some type of special presentation for new Members that are in attendance at District meetings. 7. New Club should have held at least three service projects and one fundraiser by the end of their second year. 8. Club Mentor (s) should check on the Club at least once a quarter or more often as necessary. 9. Club Mentor (s) should assist Club in holding Officer-elections and providing new Officer training and planning session. 10. At end of 2nd year, Club should do an Assessment (see form). 11. Club should run another NOW or WOW event.

06/03/22





NEW CLUB FOLLOW-UP TRACKING

<p>Fundraising Projects See Details →</p> <p>Financial Structure</p> <p><u>3RD ORIENTATION MEETING</u> For All Members</p> <p>Topic - Membership</p> <ol style="list-style-type: none"> a. Presenter b. Fellowship c. Attendance d. Growth Strategy e. Communications f. Programs 	<p><u>FUNDRAISING PROJECT</u></p> <ul style="list-style-type: none"> • Project Name • Date & Location • Goal of Project • # of Club Members involved • # of other Members involved • Outcome of Project • Was Goal of Project met? • If not, why not? • Would Club repeat project? 	<p><u>270 DAY FOLLOW-UP</u></p> <ol style="list-style-type: none"> 1. Does the Club understand and participate in the Awards program? 2. Is the Club financially sound? 3. Had Club held a NOW or WOW program? If so, how many new members joined? 4. Is the Club aware of resources available from Optimist International? 5. Are there Club members ready to step into leadership positions for the next year-no repeats? 6. Is Club involved with or an embracer of the PGI Program? <p><u>360 DAY FOLLOW-UP</u></p> <ol style="list-style-type: none"> 1. Is Club holding orientation for new incoming officers? 2. Is Club having planning session for next year's projects and activities? 3. Are there any known problems within the Club that need to be addressed? Anyone who can help? 4. What type of communications does the Club have with members? 5. Does Club appear to be sustainable for the next two years? 6. If not, why not?
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06/03/21





NEW CLUB FOLLOW-UP REPORT

Date _____ New Club Number _____ New Club Name _____ Date Organized _____

Sponsor Club Number _____ Sponsor Club Name _____

Representative _____

Name Title Phone

District Representative _____

Name Title Phone

30 DAYS

Speaker/Program: _____

Please rate the general reaction to the speaker/program. (Poor) 1 2 3 4 5 (Excellent)

Additional comments: _____

60 DAYS

Speaker/Program: _____

Please rate the general reaction to the speaker/program. (Poor) 1 2 3 4 5 (Excellent)

Additional comments: _____

90 DAYS

Speaker/Program: _____

Please rate the general reaction to the speaker/program. (Poor) 1 2 3 4 5 (Excellent)

Additional comments: _____

TO BE COMPLETED FOR CERTIFICATION:

Two charter officers attend a District meeting or District Convention? Yes No

Assist the New Club in planning at least one service project? Yes No

Club Service Project _____

Please rate the effectiveness of the Club's first service project. (Not Effective) 1 2 3 4 5 (Very Effective)

Assist the New Club in planning at least one fund raising project? Yes No

Fund Raising Project _____

Please rate the effectiveness of the Club's first fund raising project. (Not Effective) 1 2 3 4 5 (Very Effective)

Were all new members given orientation? Yes No

Club e-mail set-up Yes No

Has the Club become incorporated? Yes No

Have Club Officers successfully logged onto Optimist Leaders?

Yes No

Secretary/Treasurer completed set-up of records? Yes No

Secretary collected and added online Club Members e-mail addresses?

Yes No

Club adopted an annual budget? Yes No

Rate the general interest of the Club's membership and the performance of the officers. (Poor) 1 2 3 4 5 (Excellent)

Have the Club officers logged on to the LMS? Yes No

060922





Certificate of Completion for Building a New Club

We do certify that the Optimist Club of _____,
Sponsor of the Optimist Club of _____,
Has in every respect completed the Orientation Phase of the New Club Follow-Up Program as outlined on the New Club Follow-Up Report and has submitted a copy of the New Club Follow-Up Report to the New Club Charter President, the District Governor, and the Optimist International Field Representative, and is entitled to all the benefits related thereto. The Sponsor Club and the District Representative understand that future follow-up with the New Club, as described in the New Club Follow-Up Program and outlined on the New Club Follow-Up Tracking document is in the best interest of the New Club.

Date _____

Attested by: _____

Charter President Signature

Sponsor Club President Signature

District Representative Signature

