

New Club Database Training Guide



www.OptimistLeaders.org/NewClubDatabase

New Club Database Training Guide

The best way to be informed about New Club Building projects

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Features Overview

Optimist Leaders Online

Home

Google™ Custom Search Search

Reports & Payments Teaching Materials Leadership Information Clubs District Personal Development

Welcome to the New Club Database 2010-2011

Clubs in Progress Completed Clubs

New Club Database

New Club Home Page New Club Database Guide

Contact the New Club Department (800) 500-8130

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Logged in as: Maggie Fairchild (ADMIN - Membership) ADMIN

Change Club Show DashBoard Accounting Reports User/ Password Lookup Member Lookup Logon Attempts Change Password Statistics Matrix Leaders Portfolio New Club Database

To access the New Club Database, go to www.OptimistLeaders.org, be sure you are logged in to be permitted to make edits and additions

- Open the New Club Database homepage from the navigation panel
- New Club Projects in progress are accessed using this button
- Clubs that have Chartered and used the Database are listed
- This guide can be accessed through the homepage



New Clubs in Progress Listing

- This primary listing page is sorted automatically by District
- The list can be filtered or sorted by each column header
- Details give a snapshot of each Club's progress
- The key person working on building the Club has contact information listed
- Open a Club listing by clicking on it to view the entire Club record
- Click to add a new Club to the Clubs in Progress listing (pg.3)

District #	Abbr	Proposed New Club	Club 1 - Sponsor Club 1	Club 2 - Sponsor Club 2	Contact	Date Filed/Start Date/Target Date/Charter Date	Kit, Colg, Pilot, Sports, Comments, Chtr Mbrs, Last Date
00	NON-DIST	Test Club, Mo New Club # 90004	1. 30		1. Aaron Kaskowitz	07-22-10 09-22-10 12-21-10 09-09-10	k P Entries: 1 Mbrs: 7 01-06-11
01	ANC	Cireleville, Ny New Club # 01001	1. 01905 - Southern Ulster, Ny		1. Irwin Goldberg 845-891-8778	10-20-10 10-19-10 11-20-10	P
02	AC	Dublin, Oh	1. 02001 - New Kensington-Aleghny Valley, Pa		1. Scott R Pinheiro 732-754-8845	12-30-09 12-30-09 03-10-10	k
02	AC	Newark, Nj At Horton Dance Studio	1. 02004 - Hillsborough, Nj		1. Scott R Pinheiro 732-274-0232	03-03-10 03-03-10 03-24-10	k
02	AC	Nassau And Suffolk County, Ny Geico Retirees	1. 02371 - Monroe & South Brunswick Twp, Nj		1. Scott R Pinheiro 732-274-0232	03-03-10 03-03-10 03-30-10	k
02	AC	Brazil United Oo Huntington Sta., Ny	1. 02371 - Monroe & South Brunswick Twp, Nj		1. Scott R Pinheiro 732-274-0232	09-03-10 09-07-10 09-15-10	k S
03	KYWW	Murray, Ky	1. 03298 - Russellville, Ky		1. Clarence Gamble	09-08-09	k C



Adding a New Club Project

- Enter Sponsor Club number(s)
 - Auto-fill will take effect for the Club name and District & Zone numbers.

- Enter the new Club name.

- Check the box if you would like a New Club Kit shipped to the key contact (address below)

- Check all boxes that apply for Club type.

- Enter the primary contact's name and click *Search Name*.
 - A pop-up will appear to select contact information

**New Club Building
Sponsor Commitment Form**
(New)

On behalf of the: *(Sponsoring Club)*

(1) Club # Name

(2) Club # Name

District #

Zone #

I/we hereby commit to sponsor a new Club in the location known as:

The geographic location of the proposed new Club is in my District.
 The geographic location of the proposed new Club is out of my District.
(see International Board Policy I-5 regarding NCB across district boundaries located at optimistleaders.org)

Please note that the proposed name of the New Club is subject to the approval of Optimist International. Also, New Club Building Progress reports are required and must be filed in a timely manner with Optimist International during the New Club Building Process.

Please mark this box if ...

you would like to receive a New Club Building Kit. eMail Sent

This is a:

Pilot Club
 College Club
 Sports Club

Search Name

First Last

Mbr #:

Name:

Address:

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Maggie Fairchild

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ADMIN

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Tracking & Updating Club Projects

- Navigation buttons

- Click edit to make updates anytime

- Contact information for the Sponsor Club, District Officers and the key builder

- Click the Build Team button to add information for your team mates in building the Club

- See how Checklist works on next page

New Club Database
In Progress

Proposed Club Name: **TEST CLUB, MO (# 90004)**

Now Org Year: 2011
NCB Org Year: 2011
District # 00, Zone #

Filed Date: 07-22-2010
Start Date: 09-22-2010
Target Date: 12-21-2010
Charter Date: 09-09-2010

Sponsor # 30, (Dist # , Zone #)

Contact
Aaron Kaskowitz
4494 LINDELL BLVD
ST. LOUIS, MO 63108 (US)
B: 314-371-8000
F: 314-371-8008
aaron.kaskowitz@optimist.org

Progress / Check-off List

- Sponsor Commitment Form
- Acquired 15 or more Charter Members; (**Pilot Club**) (3 Charter / 2 Paid / 1 College / 1 Kit) {Need 12 more}
[Add members with the Club Roster button]
This club has 1 college members; 50% of membership (1) or more constitutes a College Club.
Please change this club to a College Club by clicking the Edit button.
- Pilot Club College Club Sports Club
- Established Club Dues. (Please update By-Laws; ARTICLE X – REVENUE, Section 2)
- Nominated Club Officer(s)
CLUB PRESIDENT - MARCUS SHEKER
CLUB SECRETARY - AARON KASKOWITZ
- Charter Date: 09-09-2010

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Progress Check List

- The Progress List automatically checks off completed items
You know you're getting close to Chartering when everything has been checked off

- Click *Add Note* to communicate between builders, Officers and Field Representatives, etc.

- Click to open or update a note

Last modified:
Marcus Sheker
01-06-2011
05:29 PM

Buttons: Back, Edit, Delete, Print, Club Roster, Build Team, By-Laws, Status Report

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CLUB PRESIDENT - MARCUS SHEKER
CLUB SECRETARY - AARON KASKOWITZ
- Charter Date: 09-09-2010

Ready to transfer data to LIVE database

Notes

Date	Notes	User
09/04/2010	Test 1	Maggie Fairchild

Notes 1 to 1 of 1

Add Note

Record # 1007

Matrix

- Leaders Portfolio
- New Club Database
- District Directory
- Logoff
- Forms
- Optimist E-Mail
- Optimist Website
- Contact Us

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Optimist Leadership Online




Charter Club Roster

- Add new or potential Members to the Roster.
- Keep a working list of new Members leads.
- Denote Club Officers
- Track who has Paid
- Delete a potential Member from the working Roster list by opening their record
- Deletions remain visible to retain contact information.
- Print the Roster

New Club Building

Club Roster

Charter Members



Back Add Member Print Roster

Charter Member								
#	Name (Gender)	Address	Phone	Officer	Colg	Paid	New Lead	
1	MARCUS SHEKER (?)	MO (US)		P	X	X	2	
2	AARON KASKOWITZ (M)	OPTIMIST WAY MIAMI; MO 12345 (US) H: (240) 421-4141		S		X	3	
* Put into them at the Charter meeting on January 2001								
3	MAGGIE ZFAIRCHILD (F)	MO (US)				X	3	
4	KAI GANSNER (M)	4494 LINDELL BLVD.; ST. LOUIS, MO 63108 (US)	gansnerk@optimist.org				2	
(Deleted)								
#	Name (Gender)	Address	Phone	Officer	Colg	Paid	New Lead	
	JACKIE MOORE (F)	4494 LINDELL BLVD.; ST. LOUIS, MO 63108 (US)	moorej@optimist.org					
4 Total Charter Members					2	1	2	3
Pilot Club (Minumum 15 Charter Members)								
4 Total Charter Members; Need 11 More								
2 Officers								
1 College Member								
2 Paid Members								

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Status Report

Update the Status Report as you take necessary steps to organize.

- Optimist Club location and meeting information can be entered here
- Set a target date for Organization
- Select a Field Representative for the Organizational Meeting
- Select which Certified Club Builder helped build the Club
- Fill in Builders of Excellence by searching their name

New Club Building Status Report

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Sponsoring Clubs:

New Club's District (Zone)
00 - NON-DISTRICT (00)

District # 90 - NOT IN DISTRICT
Zone # 00 New Club # 90004
[Get next Club #](#)

Lt. Governor:
Present At Meeting

New Club Name:
TEST CLUB, MO
New Club Legal Name:
SAINT LOUIS OPTIMIST CLUB, MO

Country: UNITED STATES
State/Prov: MISSOURI
City:

Language: English

Meeting Location:
Place:
Frequency: WEEKLY
Day of week: Tuesday
Description:

Filed Date: 07/22/2010 Target Date: 12/21/2010 Charter Date: 09/09/2010
Org Year: 2011 Clubs This Year: 0 (12) # of miles from sponsor Club: 10

Check for ALL Field Reps; uncheck for only in District
Field Rep:
 Check for ALL Certified Club Builders; uncheck for only in District
CCB:

Builder of Excellence (BOE):

Name	Member #	First	Last	Search
------	----------	-------	------	--------

[Back/Cancel](#) [Save/Update](#)

