



Optimist International New Club Building Guide

January

For Questions

Contact Optimist International New Club Building or Membership Departments

New Club 314- 333-1327 Membership 314- 333-1327



Future Builder of Excellence,

Thank you for deciding to investigate the recommended processes and procedures for developing a new Optimist Club in your area. It will be an extremely rewarding journey

creating new friendships for you and others on your team. It also could establish a legacy in a community that will thrive for years to come.

This guide illustrates best practices developed over a number of years by Optimists who have worked on New Club development in their respective Districts. These are recommendations for you to consider but only you can decide which of these may best work for your particular project.

A key factor for New Club development is flexibility. Future Builders of Excellence need to be able to adapt to change during the course of the development process. In other words, if one of the suggested methods in this guide is not working, discard it and move on to a different approach. No New Club development projects are the same because not all new development areas are the same. Remaining flexible during the process makes it easier to adapt to change and to fend off disappointment and discouragement.

I want to encourage you to move forward with the idea of New Club development and want to remind you that help is available every step of the way during your project. Use the phone numbers on the cover page to ask questions. An email will also do the trick to newclub@optimist.org or membership@optimist.org. The staff at Optimist International is ready to assist you throughout the New Club development process.

So take some time to review this guide and if it produces any questions, just ask. Good luck on your project and thank you for spreading the mission of Optimist International to a new community.



Jim Boyd
Director of Strategic Growth
Optimist International



What Type of Optimist Club Should I Develop?

You may already have an idea of the type of Optimist Club you would like to develop. Even so, it is always a good idea to explore all the options before embarking on a project. We currently have seven types of Clubs available for development.

The Traditional Club

Most Optimists belong to this type of Club. It meets weekly, bi-weekly or monthly. The charter members determine the frequency of meetings. However, Optimist International recommends a bi weekly meeting schedule. Development of a traditional Club requires...

A Minimum of 15 members.

A One Time New Club Fee of \$325

“Charter Members” should pay an initiation or charter fee of \$30.

Dues should be set at a level to cover Optimist International and home District obligations.

There can be up to two Sponsor Clubs for a new Club project and four “Builders of Excellence.” For more information about Sponsor Clubs and Builders of Excellence, see Appendix A. While not required, sponsor Clubs are strongly encourage for any new Club development process.

The Sports Club

“Sports Clubs” are Optimist Clubs who organize and oversee youth athletic leagues or events. There are many different types of Sports Clubs. Some solely to administer an athletic league(s) and otherwise have little in common with “traditional” Optimist Clubs. A majority of Sports Clubs run athletic programs, but also participates in other traditional Optimist activities such as Essay, Oratorical, and non-athletic community service. Regardless of activities, Sports Clubs are Optimist Clubs in the same capacity as any other Optimist Clubs. The requirements for forming a Sports Club are the same as a regular Club. The dues are the same and they are eligible for any incentives, scholarships, etc. offered by Optimist International. Information specific for Sports Clubs concerning membership and insurance should be reviewed in Appendix B.

The College Club

The College Club is similar in structure to a traditional Optimist Club. A minimum of 15 full time students is required to organize the group and leadership is similar to the traditional Club with a president, secretary treasurer, vice presidents and a Board of Directors. The big difference is the structure for dues and fees. Dues for College students are just \$10 a year. There is also an annual affiliation fee of \$100 payable to Optimist International. The sponsor Club of the College Club is encouraged to pay the affiliation fee. Use [this link](#) to discover more information on the Optimist International website about College Clubs.

Overseas Optimist Clubs

New Clubs developed in areas outside of North America, most of the Caribbean nations and a few countries in Asia fall under a program aimed at enhancing international development.

These clubs have the same initial membership requirements as a traditional club. Dues \$10 US per member per year. There is also an annual affiliation fee of \$225 US. A sponsor Club from the United or Canada is required for all overseas Clubs. The sponsor Club is strongly encouraged to assist the new Club, financially, by paying the affiliation fee for at least the first three years of the new Club's existence. If the project is in the European Union, Japan, Taiwan, Australia or New Zealand, regular international dues apply. International Clubs outside North America and the Caribbean are non-District Clubs. This means the rules for Builders of Excellence and Sponsor Clubs still apply, but the members will be located in a non-District category and will not be part of a District's membership.

Special Needs/Adults with Exceptionalities Clubs

These Clubs are comprised primarily of people who have intellectual or developmental disabilities. At least 50 percent of the charter membership must be comprised of people in this segment of society. It is imperative that some members come from the general population to assist the Special Needs/Adults with Exceptionalities members with projects and administrative tasks. Initial membership requirements are the same as for traditional Clubs. Dues are \$10 US per year and there is an annual affiliation fee of \$225 US. There should also be a sponsor club willing to assist the new Club financially by paying the affiliation fee. The Special Needs/Adults with Exceptionalities Optimist Club is a partnership between a local Optimist Club and an agency in the community that caters to this segment of the population. Working with those organizations is critical to the development process for this type of new Club. Optimist International has created a [Special Needs Advisors' Guide](#) that further explains the development process as well as suggestions for projects and fundraisers.

[Junior Optimist Clubs](#)

Junior Optimist Clubs may be the best known of the different types of Clubs after the traditional Club model. JOI (Junior Optimist International) is a separate division of Optimist International. JOI Clubs consist of students, 18 and under, who conduct community service projects just like traditional Clubs. They operate in a similar fashion and have the same type of leadership structure. It is critical to the success of a junior Optimist Club in a school setting to have a faculty advisor who can assist with the operation of the Club. It is equally important to have a liaison from the Sponsor Club actively engaged in the JOI Club's operation. Clicking on the Junior Optimist Club title for this section will take you to the JOI page.

[Club Within a Club](#)

Optimist Clubs sometimes face stagnation through lack of new member additions or aging of the general membership. This model aims to rejuvenate an existing Club while simultaneously providing a vehicle for another generation or segment of the population to embrace the mission of Optimist International. The Club within a Club is a subdivision of the existing or parent Club capable of doing its own projects and fundraising. Funds for the group run through the parent Club's bank account and a member of the Club within a Club can have a seat on the parent Club's Board of Directors. The model requires 15 members who are added to the parent Club's roster in one day. More information about the Club within a Club is [here](#).

Regardless of the model of Club you select, a tremendous asset for recruiting purposes is the [Optimist Creed](#). Thousands of current members joined Optimist International because of the Creed and the way of life, it represents. This guide will detail recruiting methods in subsequent pages. Optimist International suggests that regardless of method, the New Club developer should always allow the presentation to include comment about the Optimist Creed. You need a powerful recruiting tool for your project and the Creed is it.



The New Club Development Process 10 weeks from Start to Finish

Once you have targeted a new community for an Optimist Club, it is imperative you learn as much as you can about it. This is the Needs Assessment segment of the development process. While there are websites that can give you statistical information about a community (see Appendix C) we have found the process works much better if the New Club developer actually engages in conversation through a series of appointments.

Who are the Charter Member Prospects?

There are a number of great sources of information in a community. Elected officials, Chamber of Commerce officers, representatives of the United Way, the local Boys and Girls Club, the Ronald McDonald House, leaders of the school district and the list goes on. The New Club developer should make appointments with these people and others with one question in mind; "What could a new group of 15-20 people do in this community that would help improve the lives of young people?" One of the keys during the needs assessment is listening. It is likely that a particular area of need will surface as you talk to more and more people. This particular area could easily become the new Optimist Club's first project. Keep the appointment to 20-30 minutes to respect a person's time.

During the appointment, it is perfectly all right to ask whether there are other service Clubs in the community and how those Clubs are doing. Most officials will be candid with you. This question will give you a better understanding of the community from the standpoint of whether people there actually engage in community service.

Allow two to three weeks for this investigative process to run its course. In the end, you should have a good idea of where needs for young people exist in a community you can use that information as part of your recruiting effort. It is always easier to recruit to a cause as opposed to just trying to recruit people to join a group that has no initial focus.

Objections

The process of New Club development involves a lot of asking and sometimes many responses that can be deflating. Keep in mind that anytime someone says no to your invitation to join the new club as a charter member you are that much closer to someone saying yes. On numerous occasions, prospects will come up with excuses for the reason they are saying no. Below you will find possible ways to answer the most common objections or excuses for not wanting to get involved with a new Optimist Club project.

“I’m too busy” or “people are too busy.” **Possible response;** “There are 720 hours in a month. Can you spare three in order to make the lives of Children better and make yourself a better person?”

Prospects often have the belief that joining an organization like an Optimist Club will take hours and hours of their time. While it is true that people who go “all in” when becoming an Optimist so spend more time than most, the minimal commitment is really just two one hour meetings a month and maybe an hour participating in a service project. This puts into perspective the monthly commitment for the prospect and it could help turn their initial negative response into a positive one.

“Why should I have to pay to volunteer” or “People don’t want to pay to volunteer.”

Possible Response; “They/you are not paying to volunteer. You are paying to be part of a more than 100-year-old organization that provides ways to improve the lives of children. It simultaneously affords its members opportunities to grow as a person and to development leadership and personal skills that will be beneficial in their professional and personal lives.” The response can continue to reflect the facts that membership dues help pay for program development, insurance, leadership development webinars and seminars, marketing as well as administrative costs including salaries. It is also important to point out joining Optimist International is no different from an attorney joining the bar association or a doctor being a member of a medical society. They do so for continuing education, networking and so forth. The same is true for membership in a service organization like Optimist International.

“There are already enough service Clubs in the community.” **Possible response;** “Is everyone who could be giving back to your community engaged with a group providing service to young people? In a community of this size I am almost certain we could find 15 or more people who are not.”

This is when your needs assessment information comes in handy. You should already know the population of the community. This lends credence to the statement of finding 15 people who are not involved in the other service organizations. If a community has thousands and thousands of people and service clubs that have total membership of a couple or a few hundred people, the scenario bodes well for finding the 15 people you need to start the new Optimist Club.

Objections are part of the process of New Club development. Since Optimist International began spreading its mission by developing new Clubs in communities, prospects have said “no.” There is an old sales adage that says something like, “90 percent of the sales calls will end with a no. But it’s the other 10 percent that will make you rich.” You are looking for the 10 percent to form a new community service organization and sometimes they are easier to find than you think.

WEEKS 4-7

INFORMATIONAL MEETINGS/MEET AND GREETINGS/PERSONAL APPOINTMENTS

The fourth through 7th weeks of a New Club development project is when it all starts to come together. You have completed your due diligence and you should now have a good idea of what the new Club’s first project could be. Remember, knowing the direction for the first project will be helpful with your recruiting efforts. Another critical point to remember is that you personally or your Club should not be solely responsible for recruiting all the charter members.

1. Start by developing a core group of five or six individuals. They should be:

- A. Well known in the community.
- B. Community or business leaders.
- C. People with good reputations within the community.
- D. Outgoing, interested and willing to help build an Optimist Club.

2. Schedule a meeting with your core group.

- A. Have a discussion on reasons for forming an Optimist Club in their community. List needs, benefits and potential obstacles.

B. Ask your core members to start thinking of others in the community whom they think would be a good fit for the group. Ask each to invite someone to a future gathering.

There are three methods for branching out beyond the Core group you have assembled.

1. **The Informational Meeting.** This gathering is scheduled to begin at a certain time of the day when all prospects are invited to come and listen about the new Optimist Club coming to the community, membership requirements, and project possibilities. It should last between 30 and 45 minutes. This time frame respects the time of the prospect while giving the new Club developer many opportunities to explain how the Club works, what types of projects it will, financial requirements and to field questions from the prospect. Membership applications should be available and handed out. You should ask those who are interested to fill them out and if possible, provide you with the Charter membership fee. This is what we call being "Signed and Paid." When you have 15 people "signed and paid" you are ready to have the new Club organized.

There is a downside to the Informational meeting. It requires all of the prospects to have the same time and day available on their calendar and it requires at least an hour of their time for the meeting and traveling to and from it. Calendars are already packed with appointments and reminders for most people and getting a group together for an informational meeting could prove challenging. The Core Group may be able to help provide guidance in this regard.

2. **The Meet and Greet.** This type of gathering allows the prospect to have a little more flexibility while still giving you the opportunity to present information to them. The Meet and Greet is set up at an establishment, preferably immediately after work hours, at which prospects can drop in, learn about the Optimist project and leave. We suggest immediately after work (5-7) because most people are willing to make a stop on the way home from the office but once home, they are little more reluctant to leave again. Here are some important points to remember.

A. Create a Facebook page on which you can advertise the Meet and Greet and other new Club development activities during the project. Ask the Core group members to advertise as well on their social media sites. You can also ask the Chamber of Commerce whether you can put notice of the Meet and Greet in the Chamber's weekly newsletter.

B. Have some appetizers available or other snack type food and perhaps beverages. This makes the event more welcoming and allows it to take on a social aspect.

- C. Have several Club members who are knowledgeable about the Optimists at the meet and greet. As people come in to the gathering, an Optimist can greet the prospect and then talk to the individual one on one. Provide each guest with a membership brochure.
- D. Keep the conversation short (10-15 minutes) Remember your prospect is on the way home and there could be obligations there that they have to meet. Mention topics similar to those in the informational meeting but do not be bogged down in details.
- E. Ask them to fill out the application and pay the charter member fee. Remember, "Signed and Paid."

3. Personal Appointments. These catch those who could not attend the Meet and Greet or the Informational meeting. If someone is interested in the Club, schedule a one on one with them at their convenience. By adjusting to their schedule, you are more accommodating and may have a better opportunity to sign them up. 15-20 minutes is all you need to explain what you are trying accomplish. At the end of the appointment, be sure to ask them to sign up and pay the charter fee.

Remember the charter fee is to help the new Club establish its treasury. If the club starts with just 15 members that would mean the Club's treasury would have \$450 to start operations. Most people are willing to pay it knowing the money is going to stay in the community. On rare occasions, it is used to pay the new Club fee to Optimist International of \$425. However, in most cases, the sponsor Club(s) pay this fee for the new Club. Take note of the following recruiting tip.

The 48-Hour Rule

This rule is very beneficial for keeping the project moving forward while saving you a lot of time trying to chase prospects. Most people know almost immediately after a presentation whether they want to get involved. If a prospect states they want to think about it this is fine. It is important for you, the Club developer, to maintain control of the project. If someone asks for time to think about it, give it to him or her. Also, tell them you will be following up in 48 hours to get their decision. Their time is precious, and so is your time. Getting a decision in 48 hours allows you to move on if they say yes or no. You should always take the initiative to contact them for follow up. Never ask them to let you know because you may never hear from them again.

The Informational Meeting, The Meet & Greet and Personal Appointments should be repeated throughout the fourth through 7th weeks of the development period. Varying the times of the gathering will provide more opportunities for success because that will be more accommodating for the schedules of your prospects.

The New Club Database

This is a tool every New Club developer should familiarize themselves with during the new Club development process. It is an easy to use web based application allowing for the creation of a Club membership roster and other pertinent information online. A member of your team should create an entry on the database at the start the project. Periodically update the information during your project. The new Club database is on the Optimist Leaders website and is password protected. Your Club President and Club Secretary-Treasurer have passwords to the site. Ask them to share their login credentials if you do not have one in order to start an entry for your project. There is a tutorial for how to use the site [here](#). Below are some points to get you started with the New Club Database.

1. After logging on to Optimist Leaders and clicking on the link to the new Club database in the drop down menu, click on add a new club.
2. Fill in the sponsor Club information and proposed name for the new Club. Follow this step by answering the questions on the form and then insert the project's primary contact information. Use the search name function to help self-populate the fields in the form.
3. Be sure to sign the bottom using your initial and provide your title. Hit submit and the program creates your entry.
4. After creation of the entry, a new page appears of all of the projects. They are listed in numerical order based on District. Find your entry and click on it.
5. The new page has several buttons providing options for possible next steps. You should focus on Club Roster and Status Report. The Club Roster button opens up the application allowing you to put in the contact information for a Charter member. The Status report button allows you to update the project additional information such as location of the Club's meeting, the time and place of it, names of builders of excellence and so forth.

Please contact the New Club Building or Membership Departments for clarification if questions surface about data requested on the database. Using tool makes much of the work for the new Club project easier for the Builders of Excellence and the staff at Optimist International.

Weeks 8-11 The Home Stretch

The New Club development project should be nearing its conclusion at this stage if you and your team have diligently worked on it during the first two thirds of the effort. Several names are already on the New Club database and just a few more will get your project to the minimum 15 people needed to organize the Club. Continue to ask those people already committed to bring others to listen to the information you have been providing about the new Club. Many seasoned new Club developers actually strive to attain a minimum of 20 charter members while others have a goal of 25. Attrition can be detrimental to a new Club's early success. Moreover, with a higher number of charter members, the club minimizes the impact of those early departures.

As the recruiting portion of the project winds down there are several key points to keep in mind.

1. You have been keeping the governor and lieutenant governor apprised of your progress during your project. Contact both when you reach the minimum charter member number to determine when they are available to come to an organizational meeting. Their schedule should dictate when you should schedule the meeting.
2. Notify Optimist International (**at least two weeks in advance**) of the proposed date of the organizational meeting. Contact the New Club Building department. It assigns an Optimist International field representative to conduct your organizational meeting.
3. The New Club developer must conduct a pre-organizational meeting five to seven days prior to the organizational meeting with as many of the Charter Members as possible. Topics for the pre organizational meeting include reviewing the Club by-Laws, establishing a slate of officers (note below) and determining meeting date, time and frequency. The official organizational documents require all of this information for the Club to become official.
 - A. Club officers are president, secretary, treasurer, one or two vice presidents, and at least four members for the Board of Directors. The same person can occupy the offices of secretary and treasurer.
4. A minimum of nine charter members (non-Optimists) must attend for the organizational meeting to go forward.
5. The first 15 members of the Charter Club must be non-Optimists. Optimist members can be part of the new club's roster but they cannot be part of the group that satisfies the minimum member requirement. All must be "**Signed and Paid**" prior to the organizational meeting.

The Organizational Meeting

The Optimist International field representative conducts the organizational meeting but it is important for the New Club developer to understand what will happen so charter members have an understanding as well. The meeting should last *no more than one hour*.

1. Charter members will take an oath to become members of Optimist International.
2. Charter members get a new member packet and a charter member lapel pin.
3. The members approve the previously discussed Club by laws.
4. A report is presented, normally by the Charter President, on the slate of candidates for office. A vote of the Club members follows.
5. The organizational meeting includes induction of the Club officers
6. Members learn of the appointment of the secretary treasurer.
7. The organizational meeting includes the first meeting of the Club's board of directors.
8. A group photo is required before the new club members depart for the New Club announcement on social media.
9. A builder of excellence or the field representative should contact the Optimist International President so he/she can offer congratulatory and encouraging remarks to the new Club president, officers and members. Optimist International staff works out the logistics for the call.
10. Congratulations. You officially are a Builder of Excellence.

Sending documentation of the organizational meeting to Optimist International is the responsibility of the field representative. He/she may ask you for clarifying information not readily available on the New Club Database. The Builder of Excellence and the Field Representative should also check and double check for proper signatures on the New Club documentation. This includes a signature from a representative of the sponsor Club.

New Club Development Follow Up

The New Club Development does not stop with the organization of the new Club. It is critical for representatives of the Sponsor Club(s) to engage the new Club from the start through a mentoring or follow-up program. This process requires hands on guidance when possible to explain proper Club administration practices, fiduciary responsibilities, project and fundraising development and participation in Optimist activities at the District and International levels. A detailed overview of the new Club Follow-Up program can be found [here](#). The Sponsor Club(s) must commit to at least a year of follow up with the new Club to help it establish a path toward

longevity. Direct questions about the follow up program to the New Club Building department at Optimist International. newclub@optimist.org

The Mission Statement of Optimist International is “By providing Hope and a Positive Vision, Optimists Bring Out the Best in young people, their community and themselves.” A New Club development project lends itself to fulfilling that mission in a new or underserved community. Your willingness to become involved creates an opportunity to enhance the lives of children for years to come. Thank you for the commitment to growing this organization.

Appendix A Sponsor Club/ Builder of Excellence

Sponsor Club - The Sponsor Club takes on the responsibility for a New Club development project. The Club commits to the project by having a representative fill out the New Club sponsor commitment form on the new Club database. The Sponsor Club has the option of helping the new Club financially with startup costs including the new Club fee. It is not required to do so. The responsibilities of the sponsor Club continue after the new Club organizes by executing the new Club follow up program. The Sponsor Club designation is an option for a Club to become a Distinguished Club with the Optimist International Awards program

Builder of Excellence- The designation of Builder of Excellence is one of the highest individual honors bestowed on a member by Optimist International. It demonstrates a commitment by a member to spread the mission of the organization to a community or an underserved community. Up to four people can receive Builder of Excellence designations for a new Club project. They do not have to be from the same Club or Clubs. It is possible for a Builder of Excellence designation to be awarded to a Charter member of the new Club if others believe the individual has made a significant contribution to the project. Builders of Excellence are awarded a medallion for their first, successful new Club project. Subsequent projects carry an award of a star that can be affixed to the ribbon holding the medallion.



Appendix B Sports Club Insurance Specifications

It is imperative that any Sports Clubs understand Optimist International's insurance policies and their coverage. All Optimist Clubs are covered under Optimist International's liability insurance policy. Liability insurance protects the Club and its Members from lawsuits related to negligence. It does not provide coverage for injuries sustained by youth or adult participants. This is called Accidental Medical Insurance and is available to Optimist Clubs at a very low cost. EVERYONE who works with youth in any supervisory capacity must be a Member to be covered under our insurance policy. This includes coaches and league administrators. Property and vehicle insurance must also be purchased separately. More information about our insurance policies can be found at www.oiclubinsurance.com. It is the responsibility of the Club to insure all of their coaches are trained in understanding various aspects of youth safety. This includes concussion protocol, hydration, proper interactions with youth, and reporting measures when dealing with the possibility of abuse. Optimist International can provide Sports Clubs with electronic training modules on these, and other topics.

Appendix C

Market Research commands the initiation of planning a new club. We've all heard the aphorisms: "A dream without a plan is just a wish," and "If you don't know where you're going, you'll probably wind up somewhere else." Conducting preliminary market research allows you

to better assess the needs of the community of your prospective new club. Hints from this demographic data will enhance your awareness when you visit the site first hand. Crawl the Web

www.citydata.com www.statcan.ca

www.citypopulation.de

www.greatschools.com

www.census.gov

Try searching for local government, school, or chamber of commerce websites.