

# SPECIAL NEEDS

## OPTIMIST CLUB



## ADVISOR GUIDE

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# GREETINGS

## FROM OPTIMIST INTERNATIONAL!

Thank you for being willing to step up to develop a Special Needs Optimist Club in your community and to help foster its growth and stability in the months and years to come. I have always found the development of a new Optimist Club to be one of the most rewarding experiences available in the organization. You will personally open up new horizons, create new friendships and develop personal presentation skills. As an advisor you will be associated with a more than 100 year old organization that strives to “Bring out the best in youth, our communities and ourselves.”

Development of a Special Needs Optimist Club is not without its challenges. But the short term hurdles that may have to be cleared during the development process are far outweighed by the long term benefits of providing community service opportunities to this segment of society. You will also be affording them avenues for personal development that otherwise may not be accessible to them.

During the course of this project, please do not hesitate to contact the New Club Department at Optimist International in St. Louis, MO at [newclub@optimist.org](mailto:newclub@optimist.org) or myself directly through [jim.boyd@optimist.org](mailto:jim.boyd@optimist.org) should questions arise that are not covered by this guide. We will endeavor to answer you as quickly as possible.

Thank you again for being willing to be a developer and/or advisor for a new Special Needs Optimist Club. I am certain that by the end of the project, you will be glad that you did.

Warmest Regards,



Jim Boyd  
Director of Strategic Growth  
Optimist International

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# HOW TO DEVELOP

## A SPECIAL NEEDS OPTIMIST CLUB

- 1 Get permission from your Optimist Club Board of Directors to sponsor a Special Needs Optimist Club in your area.
- 2 It is best to determine whether there already is an organization in the community that works with or caters to the needs of the Special Needs population. If you are unable to locate one, the local office of the United Way should be able to assist.
- 3 Contact the Director of Programming for the Special Needs organization and request an appointment. (Suggested text for an e-mail can be found on the next page of this guide.)
- 4 Take Optimist brochures with you when you meet with the Director of Programming or their representative to easily explain what is involved with an Optimist Club. Your discussion must include a review of the dues and fees associated with a Special Needs Club as outlined in this guide.
- 5 Allow the representative of the organization to determine the membership of the Special Needs Club since that person will likely have a clear understanding of who can benefit from membership.
- 6 Emphasize during the meeting with the Special Needs representative the benefits of membership to those people they serve. By being part of an Optimist Club, they will learn life skills, become a better person by trying to follow the tenets of the Optimist Creed and develop leadership skills.
- 7 A Special Needs Club must have its membership comprised of at least 50 percent of the Members who are designated as special needs individuals. Those members not classified as a special needs individual will also pay the dues rate outlined on page 3.
- 8 The standard requirements for organizing a new Club still applies. There must be a minimum of 15 people on the charter roster and at least nine of the Members must be in attendance at the organizational meeting.
- 9 The organizational meeting should contain a ceremonial atmosphere. In other words, make a big deal out of the event by creating a celebration of the new Club.
- 10 Continue to engage the new Club through its initial months of existence and beyond to develop positive relationships and provide guidance so the Club can continue to grow and prosper.



# SUGGESTED E-MAIL TEXT

## FOR APPROACHING A SPECIAL NEEDS ORGANIZATION

Greetings from Optimist International. You are receiving this inquiry because you are listed as the person who oversees programming for *(Name of organization)* and I thought it was the place to start.

My e-mail today regards a possible new chapter for *(Name of organization)*. Optimist International has a new program through which people with special needs are afforded the opportunity to form their own Optimist Club. This can provide them avenues for community service, personal growth and development of leadership skills.

Costs are minimal and in many cases, *(an existing Optimist Club or my Optimist Club)* would initially cover those expenses.

I write today to find out whether it would be possible between now and *(date)* to meet with you to discuss this idea. The process is not difficult and could easily be accomplished within a short period of time. *(Name of organization's)* Board of Directors would be kept apprised of every step of the process and its Members would be welcomed to participate in the Club and its activities.

Thank you for your time and I look forward to hearing from you.

## DUES STRUCTURE

### FOR SPECIAL NEEDS CLUBS

**Dues:** \$10 per Member per year  
for all Members.

**Annual affiliation Fee:**  
\$225 US \$225 CA





# ADVISOR AND SPONSOR CLUB RESPONSIBILITIES

The success of any Optimist Club outside the traditional model depends largely on the level of participation of the sponsor Club, its liaison and the advisor from the affiliated organization from which the new Club was formed. These recommendations when followed will help insure long term success of the new Club.

## AFFILIATED ORGANIZATION ADVISOR

- Attend all meetings of the Optimist Club. Meetings should be once or twice a month.
- Provide consultation and guidance for the Club as needed.
- Help plan and execute Club projects and fundraising activities.
- Maintain regular contact with the sponsoring Optimist Club.
- Assist new Club Members with the recruitment of new Members.
- Oversee financial obligations of the new Club.

## SPONSOR CLUB LIAISON

- Attend all meetings of the Special Needs Club when possible. Send a representative from the Club when liaison's attendance is not possible. Meetings should be once or twice a month.
- Serve as a conduit between the new Club, the sponsor Club and the Optimist District in which the new Club resides.
- Provide guidance for the training of Club Officers.
- Ensure financial obligations are met.
- Provide opportunities for the new Club Members to attend sponsor Club meetings and District meetings.
- Allow new Club Members to participate in sponsor Club projects when possible.

# PROJECT P L A N N I N G

Planning any Optimist Club project is as simple as seizing on an idea from a Member and then investigating whether the idea can translate into a community service activity the Members can support and execute. The key is to do something that will make a positive impact in the community regardless of the complexity of the effort. Some of the simplest projects have the greatest impact.

- Form a small committee from the membership to investigate and then create the project for the entire Club.
- Allow Members of the committee to assume certain responsibilities for areas of the development of the project.
- Be certain to get necessary permissions from people with oversight for the area of the community where the project will be conducted.
- Keep Club Members informed at meetings and through various methods of communication of progress in the project development, keeping them advised of the date of the event.
- Provide several reminders of the project date and time before the event takes place.
- After the project has been completed, create a document to detail planning and preparation steps for the project.
- Evaluate the project after its conclusion to note what were successful elements and areas where improvement is needed.

## POTENTIAL PROJECT IDEAS

- Park clean up
- Making greeting cards for seniors
- Ice cream social
- Spare change collection (fundraising)
- Helping at the local Humane Society
- Childhood Cancer Mile of Pennies
- Can and bottle deposit collection

More ideas at [www.optimist.org](http://www.optimist.org)





# INSURANCE

**Optimist International is able to provide liability insurance coverage for each of its Optimist Clubs. The policy provides \$1 million dollars in protection. The cost of the policy is handled through a portion of a Member's dues being applied toward the premium. This coverage provides protection against the cost of legal obligations against bodily injury and property damaged associated with a Club event. Optimist International offers certificates of insurance through its insurer to demonstrate the coverage to third parties requesting it.**

Optimist Clubs can also purchase for an additional, nominal fee, coverage for medical related expenses for members of a sport team or other groups the Optimist Club sponsors and there is additional protection available as well for Club Officers and Members of the Board of Directors.

As with most insurance policies there are exclusions to coverage for certain types of events and these should be investigated prior to conducting a Club project requiring insurance to ascertain whether coverage is available.

The Optimist International website has a wealth of information concerning insurance coverage, rates for additional policies and exclusions that have been noted.

By visiting [www.optimist.org](http://www.optimist.org), you can find information used to review the basics of the coverage and more. Detailed information about the additional coverages is located at [www.oiclubinsurance.mybenefitsolutions.com](http://www.oiclubinsurance.mybenefitsolutions.com)

Please contact Optimist International with questions not answered by these resources.

# CLUB OFFICERS AND ELECTIONS

Each Special Needs Optimist Club should have a President, Secretary, Treasurer, Vice President and four to six additional people to serve on the Board of Directors. All offices are to be for a one year term unless half of the Board Members are elected for two year terms. A slate of officers should be selected prior to the organizational meeting so they can be elected at that meeting. Officer elections are to be held during the month of May in subsequent years.

Members who display a willingness to contribute verbally during Club meetings, suggest ways of improvement for the Club, and are appreciative of the work of others could be considered candidates for office. Some of the duties of the various officers include:

**President:** Leader of the Club, conducts meetings; delegates authority by asking others to help with planning and execution of Club activities.

**Vice President:** Helps the President when asked to do so. Leads meetings and other activities when the President is not in attendance

**Secretary:** The custodian of the Club records. Maintains Club documents, takes notes at meetings for future reference, reports on past meeting activities at the next meeting.

**Treasurer:** Responsible for maintaining the Club's financial accounts.

**Board Members:** Meet monthly along with the other officers to conduct business and adopt policies governing the operation of the Club. Serve on project, fundraising and other committee when asked to do so by the President.

Officers should be installed in October which is the beginning of the Optimist fiscal year. A simple ceremony can be held during the first Club meeting in that month at which the new officers are asked to stand and repeat the following which is led by a District officer

*"I hereby solemnly promise, on my honor as an Optimist, that I will carry out the duties of the office to which I have been elected to the best of my ability, in loyalty to my Club, and in harmony with the bylaws of my Club and Optimist International, so help me God."*

District Officer concludes with the following:

*"On behalf of the authority vested in me by Optimist International, I am happy to declare you duly installed to your respective offices."*





# FUNDRAISING

Optimists Clubs obtain funding primarily through fundraising. Occasionally, an Optimist Club can successfully apply for a grant. The recommended steps for a successful fundraising project are listed below.

- STEP 1 Identify the objective. How much does the Club want to raise and how will the funds be used?
- STEP 2 Establish a budget. Sometimes a fundraiser requires the spending of funds on the front end of a project to allow for the fundraiser to happen.
- STEP 3 Always set a deadline for various stages of the planning process and for the conclusion of the fundraising effort.
- STEP 4 Create a small committee of Members to oversee the development and execution of the fundraiser.
- STEP 5 Advertise. Find low cost or no cost methods of advertising the fundraiser. Social media is a great avenue that will reach a lot of people at little or no cost. Facebook, Twitter, Snapchat, Instagram, Community Bulletin Boards, local radio stations are some methods to consider.
- STEP 6 Execution: Are there going to be any supplies needed on the day of the fundraiser in order to execute the event? Make certain these are collected and on hand before the actual fundraising activity.
- STEP 7 Allow several or all Members participate in the fundraising event.
- STEP 8 Collect donations for the fundraiser in advance should a prospective participant be unable to attend on the day of the event.
- STEP 9 Keep accurate records of what is collected and what is spent for the fundraiser.
- STEP 10 Provide a report to the Club on the results of the fundraiser including the positive areas as well as areas that could be improved upon.
- STEP 11 Thank all those involved including those outside the Club who helped with organization of the fundraiser.



## POTENTIAL FUNDRAISING IDEAS

- Selling dog toys at a dog park
- Loose change collection
- Bake sales, blanket sales, pizza and popcorn sales etc.
- Dances
- Concession stand assistance

# FOUNDATION



The “Foundation” is the charitable arm of Optimist International. One exists in the United States to service Clubs there and in the nations of the Caribbean and elsewhere in the world. The Canadian Children’s Optimist Foundation provide financial assistance to the Optimist Clubs in Canada.

Club Members and Clubs can make contributions to the Foundation to help with the funding of scholarship programs conducted by Optimist International. Some contributions are set aside to become part of competitive grant programs at the Foundation for Clubs to attain for a project. There is also some funding provided for the Junior Optimist International program.

Your Club can raise money for the Foundation through Member contributions which are tax deductible. Businesses can providing funding for your local Optimist Club and gain a tax benefit by contributing to the Foundation in your Club’s name. And fundraisers can be held with a portion of the proceeds dedicated for the Foundation.



The Optimist International Foundation  
and its activities can be found here:

[www.oifoundation.org](http://www.oifoundation.org)

The Canadian Children’s Optimist Foundation:

[www.ccof-foec.org](http://www.ccof-foec.org)



Canadian Children’s  
Optimist Foundation

# PAPERWORK REQUIREMENTS

The requirements for paperwork that needs to be filed with Optimist International are few and are designed to actually help the Club be successful in the execution of its projects and Club operations.

The **Club Pride Report** is to be submitted in September and can be filled out during the course of the administrative year. It allows the Club to note the impact of its various projects by detailing type, number of people served, partner organizations, etc. Submission of the Club Pride Report is one of the requirements for Honor Club status.

The **Honor Club Tracking Form** is to be used as a guide for the Club to reach the level of being an Honor Club. This designation recognizes proper administration of the Club in its operation, projects and activities and serves as a means to recognize the Club for “doing it right.”

The **Club Officer Elect Report** is to be filed with Optimist International in May and contains information about the officers for the next administrative year.

The **NOW Report Form** is to be used by the Club to advise Optimist International of a membership recruitment meeting.

The smooth financial operation of an Optimist Club is attained largely by the timely payment of membership dues and fees. We strongly encourage our U.S.-based Clubs to adopt an automatic payment plan through which funds will be transferred to Optimist International from the Club’s bank account using a previously adopted **ACH Debit Authorization Agreement**. The Optimist International representative who facilitated the organization of the Club should have provided guidance in this area during the organization process.





# THE OPTIMIST CREED

## Promise Yourself

To be so strong that nothing can disturb your peace of mind.

To talk health, happiness and prosperity to every person you meet.

To make all your friends feel that there is something in them.

To look at the sunny side of everything and make your optimism come true.

To think only of the best, to work only for the best, and to expect only the best.

To be just as enthusiastic about the success of others as you are about your own.

To forget the mistakes of the past and press on to the greater achievements of the future.

To wear a cheerful countenance at all times and give every living creature  
you meet a smile.

To give so much time to the improvement of yourself that you have  
no time to criticize others.

To be too large for worry, too noble for anger, too strong for fear,  
and too happy to permit the presence of trouble.

