


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</p> <p>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</p> <p>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><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.

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<p>Fundraising Projects See Details </p> <p>Financial Structure</p> <p><u>3RD ORIENTATION MEETING</u> <i>For All Members</i></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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