



## **New Club Follow-Up Program**

# Introduction

Whether traditional, virtual, 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.

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.

## **Phase I Orientation**

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. The Optimist Institute. Direct the new Club to the "[New Club Series](#)" on the left side of the Institutes home page after logging on
  - b. New Club goals (for all members)
  - c. The Optimist International Foundation
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 fundraising project.

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.

## **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.

## ORIENTATION PHASE DETAILS

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 Optimist Institute
- 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. Training should be conducted using the modules of the Optimist Institute as well at District conferences.**

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.



**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.

**The orientation phase must be completed during the first 3 months of the life of the New Club.**

### **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.

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**

#### **90 Day Follow-Up:**

- Those designated as mentors of the new Club should maintain regular contact with the new Club, offering periodic guidance for development of the new 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?
- 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 leave?

After 90 days, mentors should slowly begin to step away from the oversight activity to allow the new Club to “stand on its own.” The mentors should advise new Club officers they will always be available to provide guidance upon request.

### **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.
- 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.
- 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:**

- 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.
- Current officers should mentor 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.
- Mentors should assist with holding officer elections and completing the Club Officer Elect Report.
- Is the club aware of resources available from [optimist.org](https://optimist.org), The Optimist Institute, and The Optimist International Foundation?

The mentors, Sponsor Club, and District representative should by now know whether the New Club is healthy from a membership and financial perspective. If it is have any difficulties, This is the time to offer assistance.



## **Phase III Second Year Follow-Up**

### During the 2nd year:

- A member of the sponsor Club should contact the new Club on a quarterly basis to assess the strength of the Club and determine whether any help is needed. History has shown that the so called “sophomore slump” is the year when a lot of new Clubs fail due to a decline in membership, ineffective or a lack of leadership and financial difficulties. History has also shown that if a new Club survives through its second year there is a strong likelihood that it will be able to celebrate its 5<sup>th</sup> and 10<sup>th</sup> year anniversary. This is why the sponsor Club should have periodic contact with the new Club in its second year.

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

