

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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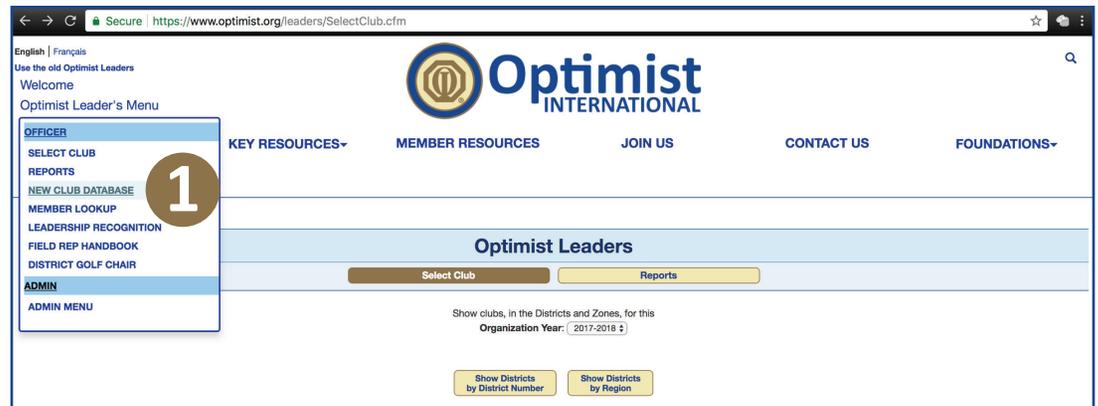


www.OptimistLeaders.org/NewClubDatabase

Features Overview

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.

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



New Clubs in Progress Listing

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

The screenshot shows the 'Optimist Leaders' section of the website. Below the navigation menu, there are buttons for 'Select Club' and 'Reports'. The main content area is titled 'New Club Database' and includes a 'Clubs in Progress' section with an 'Add' button. Below this is a table of club records. The table has columns for 'Club #', 'Abbr', 'New Club', 'Sponsor Club', 'Contact', 'Date Filed', and 'Kit, College, Sports, Comments, Members, Last Date'. The table contains three rows of data.

Club #	Abbr	New Club	Sponsor Club	Contact	Date Filed, Start Date, Charter Date	Kit, College, Sports, Comments, Members, Last Date
00	NON-DIST	Lexington	1. 17200 - Battle Creek-Harper Creek, MI 2. 17017 - Friends Of Selfridge, MI	1. David Fries	10-25-13 10-25-13 01-23-14	K Charter: 5 02-08-18
00	NON-DIST	Club Optimiste St-lsodore	1. -	1. Marc Roy 613-487-9946	08-12-17 09-01-17 09-30-17	11-15-17
01	NYNE	Test2	1. 00000 - Test Club 00000	1.	03-02-18 03-02-18 05-31-18	03-02-18



Adding a New Club Project

- 1 Enter Sponsor Club number(s). Auto-fill will take effect for the Club name and District & Zone numbers.
- 2 Enter the new Club name.
- 3 Check the box if you would like a New Club Kit shipped to the key contact (address below).
- 4 Check all boxes that apply for Club type.
- 5 Enter the primary contact's name and click Search Name. A pop-up will appear to select contact information.

The screenshot shows the 'New Club Building Sponsor Commitment Form' on the Optimist International website. The form is titled 'New Club Building Sponsor Commitment Form (New)'. It includes the following fields and options:

- On behalf of (Sponsoring Club):
 - (1) Club # [input] Name [input]
 - (2) Club # [input] Name [input]
 - District # [dropdown] (2)
 - Zone # [input]
- I/we hereby commit to sponsor a new Club in the location known as: (New Club Name) [input] (3)
- 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 MGB 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. Yes No (4)
- This is a:
 - College Club
 - Sports Club
- [Search Name] (5)
- First: [input] Last: [input]
- Mbr #: [input]
- Name: [input]



Tracking & Updating Club Projects

- 1 Navigation button.
- 2 Click edit to make updates anytime.
- 3 Contact information for the Sponsor Club, District Officers and the key builder.
- 4 Click the Build Team button to add information for your teammates in building the Club.
- 5 See how Checklist works on next page.

The screenshot shows the 'New Club Database' page for a club named 'LEXINGTON'. The page is titled 'Optimist Leaders' and includes a navigation menu with options like 'WHO WE ARE', 'KEY RESOURCES', 'MEMBER RESOURCES', 'JOIN US', 'CONTACT US', and 'FOUNDATIONS'. The main content area is divided into sections for club details, contact information, and a checklist.

1 Navigation button: The 'Back' button is highlighted with a circled '1'.

2 Click edit to make updates anytime: The 'Edit' button is highlighted with a circled '2'.

3 Contact information for the Sponsor Club, District Officers and the key builder: The contact information for the Sponsor Club, District Officers, and the key builder is highlighted with a circled '3'.

4 Click the Build Team button to add information for your teammates in building the Club: The 'Build Team' button is highlighted with a circled '4'.

5 See how Checklist works on next page: The 'Progress / Check-off List' section is highlighted with a circled '5'.

Club Details:

- Proposed Club Name: LEXINGTON
- Filed Date: 10-25-2013
- Start Date: 10-25-2013
- Target Date: 01-23-2014 --- Postpone
- Charter Date: Not yet set
- Sponsor # 17200, (Dist # 17, Zone # 06) BATTLE CREEK-HARPER CREEK, MI
- Now Org Year: 2018
- NCB Org Year: 2014 District # 00, Zone # 8
- College Club:
- Sports Club:
- NCB Kit:
- Sponsor # 17017, (Dist # 17, Zone # 16) FRIENDS OF SELFIDGE, MI

Contact Information:

- Contact David Fries**
4635 Lightning Point Dr.
Birmingham, MI 38118 (US)
(517) 472-2274
- Club President #17200 Craig A Miller**
1416 Amethyst Drive
Mason, MI 48854 (US)
(517) 525-8786
- Club President #17017 Keith Edwards**
3343 Tully Street
Livonia, MI 48150 (US)
(313) 615-3959
- District Governor #17 David Fries**
4635 Lightning Point Dr.
Birmingham, MI 38118 (US)
(517) 472-2274
- District Lt. Governor #17, Zone #06 Wilma Vanloo**
2996 Tennessee Avenue, Apt. 4A
Southfield, MI 48075 (US)
(249) 261-3968

Checklist:

- Sponsor Commitment Form
- Acquired 15 or more Charter Members; (5 Charter / 0 Paid / 0 College / 0 Kit) (Need 10 More)
(Add members with the Club Roster button)



Progress Check List

- 1** The Progress List automatically checks off completed items. You know you're getting close to Chartering when everything has been checked off.
- 2** Click to open or update a note.
- 3** Click *Add Note* to communicate between builders, Officers and Field Representatives, etc.

button and following the instructions.

Progress / Check-off List

- Sponsor Commitment Form
- Acquired 15 or more Charter Members; (5 Charter / 0 Paid / 0 College / 0 Kit) [Need 10 More]
[Add members with the Club Roster button]
- College Club Sports Club
- Nominated Club Officers(s)
Club Treasurer - john brown
- Charter Date NOT set
- Original Documents Received

Notes

Date	Notes	User
	No Notes	

Record # 1467

3 [Add Note](#)



Charter Club Roster

1 Add new or potential Members to the Roster.

2 Print the Roster.

3 Keep a working list of new Members leads.

4 Denote Club Officers.

5 Track who has paid.

Delete a potential Member from the working Roster list by opening their record.

6 Deletions remain visible to retain contact information.

English | Français
Use the old Optimist Leaders
Welcome
Optimist Leader's Menu

WHO WE ARE ▾ KEY RESOURCES ▾ MEMBER RESOURCES JOIN US CONTACT US FOUNDATIONS ▾

Optimist Leaders

Select Club Reports

New Club Building

Club Roster
Charter Members

1 2

Back Add Member Print / Download Roster

3 5

#	Name (Gender)	Address	Phone	Officer	College	Program	Paid	New	Lead
1	john brown (M)			T				X	3
2	(?)							X	2
3	(?)	(US)						X	2
4	Test Test (?)	123 Fake St.; St Louis, MO 63104 (US)				X		X	2
5	Test Test (?)	123 Fake St.; St Louis, MO 63104 (US)						X	2

4

6

#	Name (Gender)	Address	Phone	Officer	College	Program	Paid	New	Lead
	Test1 Test Test (?)	(US)							
	Robert Schiller (M)	4261 Silver Birch, West Bloomfield, MI 48323 (US)	h: 248-683-3192 schillerholdings@me.com						

5 Total Charter Member

	Officer	College	30/30	Paid	New
	1	0	0	0	5

Optimist Clubs (Minimum 15 Charter Members)

5 Total Charter Members; (Need 10 More)
1 Officer
0 College Members
0 30/30 Members
0 Paid Members

Back Add Member Print / Download Roster Roster

[Add members with the Club Roster button]

College Club Sports Club
 Nominated Club Officers(s)
 Club Treasurer - john brown
 Charter Date NOT set
 Original Documents Received



Status Report

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

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

Optimist International

Optimist Leaders

Club Roster | Select Club | Reports | Invoices / Payments

New Club Building Status Report

Sponsoring Clubs:
 22425 - CAROLINA FOREST HAPPY HOUR, SC (District # 22, Zone # 06)
 Legal Name: THE CAROLINA FOREST HAPPY HOUR OPTIMIST CLUB, SOUTH CAROLINA
 22010 - SPARTANBURG-BFT, SC (District # 22, Zone # 05)
 Legal Name: OPTIMIST CLUB OF SPARTANBURG-BFT, SC

New Club & District (Zone)
 22 - South Carolina (06)
 District # 22 - SOUTH CAROLINA
 Zone # 06 New Club #
 Get next Club #
 Lt. Governor: Thomas A Wesley - DISTRICT 22, LIEUTENANT GOVERNOR, ZONE 6

Present At Meeting
 Original Documents Received

New Club Name:
 THE OPTIMIST SPORTING CLUB OF SOUTH CAROLINA
New Club Legal Name:
 THE OPTIMIST SPORTING CLUB OF SOUTH CAROLINA

Country: UNITED STATES
 State/Prov: SOUTH CAROLINA
 City:
 Language: English

Meeting Location:
 Note: If you have multiple meeting locations, please enter just one, for now. Once this becomes a club, you can add more later.
 Place: cyber space
 Address 1:
 Address 2:
 Address 3:
 City:
 State: Zip: Country:

How often do you meet?
 Note: If you meet multiple times a month, and different days for each meeting, you can enter more than one. Once this becomes a club, you can add more later.
 e.g. 1st Tuesday & 3rd Wednesday. Just enter the 1st Tuesday!
 Frequency: (every Quarter) Time:
 Note: Club will meet in conjunction with other clubs

Filed Date: 09/21/2016 Target Date: 12/20/2016 Charter Date:
 Org Year: 2017 Clubs This Year: 0 (0) # of miles from sponsor Club:

Check for ALL Field Reps, uncheck for only in District
 Field Rep: Marino Garbin (22)
 Check for ALL Certified Club Builders, uncheck for only in District
 CCB:

Builder of Excellence (BOE):
 22425 - CAROLINA FOREST HAPPY HOUR, SC (District # 22, Zone # 06)
 22010 - SPARTANBURG-BFT, SC (District # 22, Zone # 05)

Name	Member #	First	Last	Search
Marino A Garbin Jr.	22425-000	Marino	Garbin Jr.	<input type="checkbox"/> (BOE 1)
Daniel E Grice	22010-543	Daniel	Grice	<input type="checkbox"/> (BOE 2)
Virginia Ricker	22422-001	Virginia	Ricker	<input type="checkbox"/> (BOE 3)
Melvin D Bannister	22045-003	Melvin	Bannister	<input type="checkbox"/> (BOE 4)

Caution: If more than one person has this screen open, and when you save, it may over-write what the other person has entered. Please click the Back/Cancel button if you don't want to make changes.

Back/Cancel Save/Update

