



# **New Club Development Handbook**



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## **Introduction**

This handbook contains information, forms, and examples to assist the New Club Charter Officers, the New Club Development Team, and the Sponsoring Club. These three groups are vital in starting a new club on the road to success during its initial 18-24 months.

Organizing and chartering a new club is a wonderful accomplishment! However, developing a new club into a community action team is just as important. The process is more successful and rewarding when the new club charter officers, the development team, and the sponsoring club work together. The Membership-Leadership Department is also available to answer questions and offer assistance as needed.

## **The Three Groups Who Truly Develop a New Club:**

### **Charter Officers**

### **New Club Development Team**

### **Sponsoring Club**

#### **Role of the Charter Officers**

The most important team is obviously the charter officers of the new club—the charter president and his/her board of directors. The first successes of a new club are directly linked to the efforts of the charter board of directors. The board **MUST** meet monthly as they are the decision-making team for club operations. We suggest meeting in a comfortable location (such as a board member’s business or home) where open discussion can occur. The club should provide snacks and refreshments at each meeting, if possible. On average a board meeting with a properly prepared agenda runs 60 minutes, with an additional 15-20 minutes for socializing.

Since the first meeting of the charter board of directors is such an important meeting, all board members and all development team members should attend. Because there is so much business to accomplish, the first meeting of the board of directors takes more time. Therefore we suggest serving a meal and refreshments. Detailed information on the board’s first meeting is provided in this handbook on pages 5-6.

Two sample agendas are provided for the charter president to use as a guide to develop his/her own agenda – one for the first meeting of the board of directors and another for future monthly board meetings. (Sample agendas on CD and in resource materials.)

#### **Role of the New Club Development Team**

The New Club Development Team is appointed by the District Governor shortly before or immediately after the new club charter ceremony. This team consists of two to four individuals from the sponsoring club or district. For continuity some members of the new club building team usually also serve on the new club development team.

At least one team member attends the new club’s monthly board meetings. This meeting is an open forum where discussion between the team member(s) and the club’s board members takes place. Stimulating this open discussion is an important part of this team’s responsibilities in the development of the new club. Moreover, for support and assistance we encourage one or more team member(s) to attend as many regular club meetings as possible.

In addition, during their appointment team members need to communicate frequently with the club officers by phone and email. This interaction gives the charter officers the outlet to share opportunities and situations that come up during the club's development and for the team members to offer encouragement and advice as needed.

The most important goal of the development team is for the new club to qualify as a Civitan International Honor Club during its first full fiscal year of existence.

Civitan International Membership–Leadership Department asks team members to submit quarterly reports on the progress of the new club. Copies of these forms are on CD and in resource materials.

### **Role of the Sponsoring Civitan Club and Its Officers**

The sponsoring club's principal goal was to charter the new club. However, the sponsoring club should maintain a connection with the new club. A member of the Development Team should give a progress reports at every meeting and board meeting of the sponsoring club. Also there are many opportunities for assistance during the new club's first years and the interaction motivates both clubs for success. We encourage the sponsoring club to offer to the new club opportunities for joint projects and social/fellowship events. This gives both groups a chance to meet each other and enjoy service and fellowship through Civitan. Furthermore, it is helpful to invite the charter president and president-elect to attend a regular meeting of the sponsoring club to see another club's methods and routines of a regular club meeting.

### **The Goal!**

The goal of this process is to develop a strong, viable new Civitan club that lasts decades in the community. The measurement for this process is the Honor Club Application. This award measures how the club operates in the community and covers essential areas of a quality Civitan club. Therefore, a new club needs to use the application as a road map of activities. The recognition also initiates a level of achievement for future presidents/boards to reach each year thereafter. When the club meets the requirements for Honor Club, the club earns an Honor Club Banner Patch, and the president is recognized as a Distinguished President.

Furthermore we urge the new club board to apply for Civitan International's Outstanding New Club Award. The new club may qualify for this award in its first and second years.

Copies of both applications are in the back of this handbook and the current copies of both applications are available on Civitan's website at the following links:

[www.civitan.org/honoreclubapp.pdf](http://www.civitan.org/honoreclubapp.pdf)

[www.civitan.org/newclubawardapp.pdf](http://www.civitan.org/newclubawardapp.pdf)

### **Where to Start**

The five major components to the development of a new club are:

- *Initial and Annual Training*
- *Monthly Board of Directors Meetings*
- *Conducting Projects in the Community*
- *Informative Regular Meetings*
- *Communications/Publicity*

This handbook explains each of these five components and how to put them to work in this new club. We believe all areas are important even though some areas may develop under different timelines. Our studies show that precedents set during the development of a new club create patterns by which the Civitan club operates for years and even decades into the future.

## **Initial and Annual Club Officer Training**

### **Initial Officer Training and Member Orientation**

*Charter President and President-Elect Training:* Training is the key component to the success of a new Civitan club. The charter officers should receive a job description and complete the initial officer training requirements. It is the district's responsibility to set up initial training for the charter president and president-elect. Civitan International provides materials to the trainer(s) upon request. The Certified Club Building Team, as well as the New Club Development Team, should assist in coordinating all initial training. The New Club Development Team members continue the *on-the-job* training by attending the first and subsequent meetings of the new club's Board of Directors and advising these leaders.

*Online Secretary and Treasurer Training:* The club's secretary and treasurer handbooks are available online and may be downloaded. Go to [www.civitan.org](http://www.civitan.org) and click on Leadership Training in the site listing. Then choose either Secretary Resources or Treasurer Resources. The secretary and treasurer should read and review the handbook prior to completing the online certification test for the position they hold. Each position must take the online test to earn his/her certification.

*Charter Member Orientation Session:* The Charter Member Orientation Session is an educational program with PowerPoint and script conducted by a Civitan leader from outside the club. Schedule this speaker presentation program at one of the club's regular meetings during the first quarter after charter in place of a guest speaker.

Use the following checklist to track completion of tasks.

#### **Initial Officer Training and Member Orientation Checklist**

- Club President (By district leader – before or within 15 days after charter)
- Club President-Elect (By district leader – before or within 15 days after charter)
- Online Secretary Training (Civitan International website)
- Online Treasurer Training (Civitan International website)
- Directors Training (Handout and first board meeting)
- Charter Member Orientation Session (Speaker at regular meeting)

### **Annual Officer Training**

Annually, four officers must be certified as trained in order to qualify the club for district and international voting delegates. Club presidents and presidents-elect are trained at various locations sponsored by *Civitan International Geographic Training Program*. *These training sessions have received great reviews.* They are held on a Saturday from 9:00 AM to 3:00 PM June through September at hotels located in metropolitan cities throughout North America. The president and president-elect may

attend any session throughout the country. The agenda includes motivational topics and interactive exercises among fellow presidents and presidents-elect in attendance. A qualified instructor specifically chosen by Civitan International teaches the program. The club budget should include funds to cover the expense of this annual training. (Geographic Training is scheduled to be in all North American Districts by the 2009-10 year. The District Training Coordinator currently does the training in districts that do not yet have the Geographic Training.)

Annual Online Training for Secretary and Treasurer: Each year the newly elected secretary and treasurer must be trained online (the same as was done for initial training). When a secretary or treasurer serves consecutive terms, the club must report this to the Membership-Leadership Department by written correspondence to have his/her training waived.

### **Annual Officer Training Check List**

- President (Geographic Training annually conducted by Civitan International)
- President-Elect (Geographic Training annually conducted by Civitan International)
- Online Secretary Training (Civitan International website)
- Online Treasurer Training (Civitan International website)

### **Board of Directors Meetings**

**(The group that continuously makes decisions and improves club's operations.)**

#### **First Board of Directors Meeting**

The most important event in the start-up/development of a new club is its first Board of Directors meeting. All charter officers/board members as well as all Civitan Development Team members should be in attendance.

Theme of Meeting: Education and planning

Meeting Location: A comfortable location (such as a board member's business or home). Include board-table set-up and a meal and/or refreshments.

Agenda Time Length: 90-120 Minutes (with pre-meeting preparations)

Suggestion: Break at halfway point for meal or eat at the end of the meeting.

Discussion: Led by Charter President and one Development Team member

#### **Agenda includes the following topics:**

- ◆ Dues Structure (Quarterly breakdown: Civitan International \$15, District \$\_\_, Club/Meal to be determined)
  - Dues Billing (By charter treasurer – sample dues invoice on CD & in resource materials.)
  - Payment Update on fee/dues collected to date
- ◆ Governing Documents (review for membership adoption – set date)
- ◆ Budget (review and approve initial budget – outline provided on CD & in resource materials.)
- ◆ Discussion of incorporation with state (who handles this and by when)

- ◆ Charter membership roster (push 14-day deadline for recruiting additional charter members)
- ◆ Regular Meeting dates for next month/quarter
  - Location:
  - Time:
  - Speakers: List types/names
    - Charter Member Orientation Program with speaker (during first quarter)—Civitan International provides PowerPoint presentation with script
- ◆ Discussion on Projects and Committee Chairs
  - Community Service Projects (list one to three first quarter ideas/plans)
  - Fundraising Projects (list one to three first quarter ideas/plans)
  - Support Projects: (donations to one-three groups/charities)
  - International Fund Raisers: (list one first quarter idea/plan)
  - Committee Chairs: Speakers, Community Service, Fundraising, Support/Donation, Membership/Recruiting, Newsletter Editor, Publicity. (board members/officers may initially chair some committees.)

**Monthly Board Meeting:** During the first 18 to 24 months the board makes many key decisions that mold the way in which the club operates (in some cases, for many years). Therefore it is important that at least one member of the New Club Development Team attends each board meeting as advisor, coach, guide, and mentor as the board discusses the club's business. *Some topics/items typically remain on the board's monthly agenda continuously while other items are only discussed quarterly, or even annually.* The sample agenda in this handbook provides a great example of a typical meeting of the board. Using this example, the president or the secretary should prepare a written agenda for each meeting. Schedule the meetings at an officer's business or home, and serve snacks and/or refreshments. Meetings should last between 60-90 minutes with socializing. Be sure minutes are taken, even if secretary is not in attendance.

Review progress in all above areas along with the Honor Club requirements at least quarterly and then monthly as the end of the fiscal year approaches.

## **Conduct Projects in the Community**

### ***Do Stuff in the Community!***

“Do stuff,” as simple as this may sound, is so important. Most charter members joined Civitan to help people and their community, and the sooner that begins the better. The Team concept is a great method to quickly get the charter members involved. The board of directors defines, decides on, and schedules these activities

*Need Ideas:* Survey your charter members for project ideas. Use the *Project Interest Finder* that not only asks for project ideas but also asks what *areas* members are most interested in achieving. (Membership Survey on CD & in resource materials.) The Civitan International handbook *Project Menu III* contains a list of projects accomplished by other Civitan clubs along with a complete description. The handbook is available in hardcopy through the Civitan Supply House or it can be downloaded from Civitan International's website at [www.civitan.org/ProjectMenuIII.pdf](http://www.civitan.org/ProjectMenuIII.pdf)

Committee Chairpersons: It is most important to develop committee chair positions for all projects—one person appointed to take the lead in the progress and success of the project. Whether it is community service or a fundraiser, every project needs a project chairperson.

Discussion of Ideas: The Board of Directors is responsible for the initial decision on conducting a project. At that time a chairperson should be appointed to lead the project. Then at the next regular meeting he/she introduces the project to the membership and asks for participation.

### **Major Project Equals Benefactor(s)**

We urge the new club to develop a significant project, conducted annually that is identified as the club's major signature project. It may be fundraising or community service. Identify an important need in the community and plan a project that assists in meeting this need either financially or through service. All members should be expected to participate, and publicity is important.

### **Document Projects**

Keeping records of projects is important for all clubs. We suggest that the club invest in buying a three-ring binder for each project chairperson. Ask him/her to make copies or samples of everything done in connection with the project as each step is accomplished. Record all items including needed supplies, letters/emails, expense receipts, sign-in sheets, copies, etc. This gives the project a paper trail and assists the chairman for the next year.

## **Informative Regular Meetings**

### **Regular Meeting (Showcase YOUR Club)**

Every meeting should be a quality meeting—informative with good fellowship/networking, nice meal/snacks, a great speaker, short business, and FUN!

The president provides the agenda (sample on CD and in Resource Materials), which should include:

- ✓ Guest speaker of interest at each regular meeting (give a gift to the speaker)
- ✓ Short business with project reports and updates
- ✓ Announcements of club interest and upcoming social events
- ✓ Recognize accomplishments of members (Civitan and non-Civitan)
- ✓ Give-aways...door prizes...we all love them!

Conduct a minimum of two-annual business meetings:

1. Election of the following year's officers (during March, April, or May)
2. Approval of proposed annual budget. (in September or October)

Conduct two Membership Recruitment Meetings each year

1. Goal to end year with a minimum one-member net gain!
2. Stretch goal to end year with a 20% net increase in membership

Two educational programs each year

1. The charter-member orientation program counts as one.

2. Many other options, including showing *Civitan TV* or *Talk Civitan* video, having district officer or another knowledgeable Civitan speak on Civitan International emphasis or project.

#### Initiate New Members

1. Can be done at any regular meeting, preferably shortly after the member(s) join.
2. Invite district governor or another district officer to initiate new members.
3. Present each new member a member lapel pin and a welcome packet with club roster

#### Banquets and Socials

1. Annual Installation and Awards Ceremony (August/September)
  - (a) Special occasion, perhaps a Saturday night affair
  - (b) District governor-elect or another district officer conducts installation ceremony
2. Three or Four Social Outings Annually—examples:
  - (a) Seasonal party (Halloween, Thanksgiving, Holiday)
  - (b) Spring/summer family picnic
  - (c) Friday/Saturday night socials (at member's home or office)
  - (d) Progressive dinner
  - (e) "Civitan Night" – at local sporting event (baseball, hockey, etc.)
  - (f) Civitan bowling night or softball, volleyball, croquet, etc.

### **Membership Recruitment Meeting**

Within six months after the club's charter ceremony the club board needs to schedule a Membership Recruitment Meeting. The turnover of charter members due to time conflicts and schedule changes is inevitable. The first new members of a new club can be great additions to the success that the club is already experiencing. Therefore, it is time to roll out the red carpet and introduce YOUR club to some new people. To begin the process, the board appoints a membership chairperson. Civitan International's Membership—Leadership Department has great tools to assist with conducting a Membership Recruitment Drive including a how-to manual titled "*Adding Members for Your Club's Success*". It is available in hard copy from the Civitan Supply House. It is also ready for download from Civitan International's website at [www.civitan.org/CL115.pdf](http://www.civitan.org/CL115.pdf).

### **Outside the Club – Civitan Meeting Attendance**

#### *District and International Meetings Attendance*

One obligation of a quality club is to have representation at district and international meetings. These functions are a great way to share with and learn from other clubs and to represent your club *on voting issues* and elections of district and international officers. Therefore, we strongly urge your new club to budget funds to cover expenses for proper representation at these meetings. Usually, the club president, president-elect, and/or representatives, based on the number voting delegates for which the club qualifies, attend district and international meetings. However conventions are

open to all members and their families. Attendance at district and international meetings is one of the requirements of the Honor Club application.

## **Communications/Publicity**

### **Communication with Members**

It is important to remember, “Members need to hear from the people in charge!” Leaders must communicate with the membership if the club is going to succeed. Email is the best method of communicating with members because it is effective and inexpensive. However, at certain times all members still need to hear a voice! Below are several forms of communication that we suggest your new club develop for its members.

Newsletter: It is crucial that the charter members receive a newsletter regularly. Most clubs email newsletters/bulletins once or twice a month to the all members, prospects, and recent guests. It is very important to appoint a newsletter editor, who is responsible for gathering the information and publishing the newsletter/bulletin. It is desirable for the editor to have computer skills when he/she takes on this responsibility. However, many learn on the job. Civitan International has sample newsletters in Microsoft Word format for the editors to adapt for his/her club. Also, other clubs may share their newsletters with a new club’s newsletter editor.

Email Announcements and letters: On some occasions the president, secretary, or a project chair needs to email members with announcements about club news, projects and events. Email is a great method for reminders and follow-up. Use it!

Phone or Ding-a-ling Committee: Reminder phone calls about next regular meeting are effective. The board should appoint a *ding-a-ling* committee (phone committee) to split up the club roster and phone each member prior to each regular meeting. The reminder calls provide a great communication connection, especially for a member who has missed several meetings/projects. Hearing a friendly voice can be a great way to swing him/her back into action with club activities.

Updated Rosters Quarterly: Quarterly the secretary should provide an updated roster to all members. (The best method is to send it by email and have hard copies available at meetings.)

Publicity: The club board needs to appoint a PR chairperson to be in charge of publicity for the club and to inform people in your community about your club and its activities. Civitan International Public Relations Department has a PR video and manual, available in hard copy through the Civitan Supply House. Both can also be downloaded on Civitan International website at [www.civitan.org/prvideo.htm](http://www.civitan.org/prvideo.htm) and [www.civitan.org/prmanual.pdf](http://www.civitan.org/prmanual.pdf)

Club Website: Each new club needs to consider creating its own website. You can view other clubs’ websites through the Civitan International website: [www.civitan.org/clubsites](http://www.civitan.org/clubsites). It is easier to create a club website than you may think. To

build your club's site use Civitan International's *Create Your Club's Website* at [www.civitan.org/buildclubsite](http://www.civitan.org/buildclubsite).

### **Need Assistance?**

A development team has been appointed to offer assistance to the new club for its first one or two years. If you have questions or feel you need more assistance than the development team is offering, please contact your district governor or Civitan International Membership-Leadership Department.

### **Review and Improve**

We suggest that you keep this handbook available to check off areas of development and use it to review and improve as your new club progresses over the next 18-24 months. We realize this is ongoing process and areas develop differently but remember all five major components need to be developed. Once developed, continue to review and improve the process for continued success.

### **Golden Circle Charter Funds Program**

As of the printing of this version of the handbook, Civitan International offers Golden Circle Charter Funds to be split between the new club development team and the new club when certain criteria are met on its one-year anniversary. This incentive is reviewed annually for renewal or adaptation. For further information about the current status of this incentive, please contact the Civitan International Membership-Leadership Department.

### **Volunteers Making a Difference in Our Community...**

Perhaps when you were invited to join, you received a Civitan note pad that has the heading "Civitan – Volunteers making a difference in our community." In closing we urge you to capture that passion and succeed through Civitan and we thank you for leading the process of building good citizenship in your community.

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## Online Resource Materials

- [www.civitan.org/honorclub.pdf](http://www.civitan.org/honorclub.pdf)
- [www.civitan.org/Outstd New Club.pdf](http://www.civitan.org/Outstd New Club.pdf)
- <http://www.civitan.org/secman.pdf.pdf>
- <http://www.civitan.org/treasman.pdf.pdf>
- [www.civitan.org/ProjectMenuIII.pdf](http://www.civitan.org/ProjectMenuIII.pdf)
- [www.civitan.org/clubsuccess.pdf](http://www.civitan.org/clubsuccess.pdf)
- [www.civitan.org/prvideo.htm](http://www.civitan.org/prvideo.htm)
- [www.civitan.org/prmanual.pdf](http://www.civitan.org/prmanual.pdf)
- [www.civitan.org/clubsites](http://www.civitan.org/clubsites)
- [www.civitan.org/buildclubsite](http://www.civitan.org/buildclubsite)
- [www.civitan.org/newclubhandbook.pdf](http://www.civitan.org/newclubhandbook.pdf)
- Honor Club Application
- Outstanding New Club Award
- Secretary's Training Handbook
- Treasurer's Training Handbook
- Project Menu III
- Adding New Members for Your Club's Success*
- CL115 Recruitment Meeting Manual
- Public Relations video
- Public Relations manual
- List of club websites linked to CI website
- Instructions on how create a club website



## Resource Materials and CD Contents

### **Forms**

Additions Form	Microsoft Word (tab)
Deletions/Change of Address Form	Microsoft Word (tab)
Club Officer Reporting Form	Microsoft Word (tab)
Honor Club Application	Microsoft Word
New Club of the Year Award Application	Microsoft Word
New Club Development Team Forms (three forms for five reports)	Microsoft Word

### **Club Administrative Aids**

Agenda–Board	Microsoft Word
Agenda–Orientation	Microsoft Word
Agenda–Recruitment Meeting	Microsoft Word
Agenda–Regular Meeting	Microsoft Word
Dues Invoice	Microsoft Word
Budget	Microsoft Excel
Budget Reconciliation	Microsoft Excel
Meeting Calendar	Microsoft Word
Projects Calendar	Microsoft Word
Membership Roster	Microsoft Word
Committee Roster	Microsoft Word
Membership Survey	Microsoft Word
Newsletter –Black & White	Microsoft Word
Newsletter – Color	Microsoft Word
Officer Installations and New Member Initiations	Microsoft Word
Officer Roles and Responsibilities	Microsoft Word

### **Recruitment and Communication**

Club Brochure One (front and back)	Microsoft Word (front & back)
Club Brochure Two	Adobe Reader
Club Brochure Two Instructions	Adobe Reader
Creed and Mission	Microsoft Word
Flyer	Microsoft Word
Things You May Not Know	Microsoft Word
VIP Brochure	Microsoft Word
ABC Recruitment Ideas	Microsoft Word

### **JPG Files (Logos, Clip Art, etc)**

- Civitan International Billboards
- Civitan International Logo
- Junior Civitan Logo
- Claxton Fruitcake Logo
- Clip Art – Back to Basics, Checkered Flag, Christmas Tree, Easter Bunny, Golf Balls, Happy Birthday, Money Bags, New Years, Oktoberfest, Arrow, Snowmen, US Flags, Valentine, Zoo



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