How to create a Member Handbook

The following steps should only need to be executed once, and the files saved for reprinting. Some pages will require updates once a year. Most pages are printed in “portrait” mode, but the club org chart is “landscape”.

1. Using your word processor edit the “cover page template” to replace the center image with your club logo from <https://optimist.org/member/marketing6.cfm>.
2. Review the “member handbook pages template” to make any updates appropriate for your club using your word proccessor.
3. Edit the “club org chart” to insert the names of your current officers.
4. To create the “club roster pages” log in to optimistleaders.org as a club officer. From the display of your club details, click “club roster report” at the bottom of the page. Then select “print”. Instead of destination as printer, choose instead “save as pdf”, and click “save”. You will find the document in your Downloads directory.
5. To create the “club bylaws pages” from the display of your club details, select “reports” at the top of the page. Scroll down and click on “club bylaws – online form”. Then click on “print approved bylaws”. Depending on your PC, either click the “download” button or click “print” and select “save as pdf” as in above step.
6. Some clubs have written club policies as shown in the example. Include those as a final section of your handbook.

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