

Update: December 2010

## **Actions, Challenges, Possibilities and Timelines:**

Presented below is an actionable list of steps, projects and activities for Board consideration.

- 1. OI Board of Directors to review, discuss the current Vision, Mission, Tagline(s) as well a new possible Aspiration statement, Value Proposition and Positioning Statement. Approve any new direction or enhancements and communicate effectively these Directional statements via website, magazine and all OI communications. In point establish an agreed upon goal, marketing message and marketing direction.**

**Budget Implication: \$ 0**

**Progress to date: Board discussion—December 2010**

**Marketing Committee:** The committee agrees the Board should regularly review Vision statements, Mission statements and Positioning Statements for relevancy to our target audiences and for consistency. Any major changes should be based on grounded research. We discussed questions that should drive our direction, such as *What are we deeply passionate about? What can we be the best in the world at? What drives our resource engine? How can we develop a sustainable resource engine to deliver superior performance relative to our mission? How does focusing on what we can do best tie directly to our resource engine and how does our resource engine directly reinforce what we can do best? Where should we place our resources to generate more power for our resource engine?* (Questions derived from *Good to Great and the Social Sectors* by Jim Collins, 2005). The Board and senior staff should systematically answer these questions for effective strategic direction and guidance on actions taken by staff, committees and clubs.

**The Strategic Marketing Plan reviewed by the Board in March 2009 addressed unique selling propositions for each segment of our target audience: existing members; potential members; new communities (new club opportunities); corporate sponsors; endorsed organizations; college clubs; and JOOI clubs.)**

Prime Responsibility	Staff Driver	Committee and Staff Dept Assigned	Target Dates	Preliminary Actions, Research and Design	Review, Follow-up, Testing	Full Implementation
Presiding Board Officer	Executive Director	Board of Directors/ Executive Department	October 10 to March 11	Board Discussions & Member feedback	October 10 to March 2011	March 2011

2. That a new Branding Guide be designed and developed to formalize all formal usage of OI Brand identity. Branding Guide to be available online and distributed to all Clubs via electronic means. Insure all standard branding must inspire and lead members to read and take positive action.

**Budget Implication: \$0**

**Progress to date: Completed December 2010**

**Marketing Committee:** The committee discussed this concept of developing a consistent approach to the brand identity and striving to reinforce the organization’s identity at all levels (OI office and club level).

Prime Responsibility	Staff Driver	Committee and Staff Dept Assigned	Target Dates	Preliminary Actions, Research and Design	Review, Follow-up, Testing	Full Implementation
Executive Director	Sr. Director of Marketing	Marketing Committee/ Marketing Department	October 10 to December 10	Ongoing	October 10 to December 2010	December 2010

3. A professionally developed, designed and implemented online Club President’s tutorial leadership program to educate Club Presidents with the skill sets needed from planning, serving, leading, growing to handover of a successful Club.

**Budget Implication: \$ 15,000 - \$25,000 +**

**Progress to date: Being recommended by L.D. Committee—December 2010**

**Marketing Committee:** The committee discussed how important our marketing efforts (service and growth as outcomes) are at the club level. Since our research shows that most club presidents do not attend international conventions and many do not attend district meetings where training occurs, we feel strongly that a set of web pages oriented toward club presidents be developed. A complete curriculum of materials should be provided that inspire and inform. In addition to typical topics a club president and his/her leaders would need to be informed of, we’d like to add materials on the topic of “Marketing is Local” to assist clubs and OI in gaining greater community recognition and club growth. Even those who attend leadership training modules will be able to use this as a resource for continual development as a club leader and to learn best practices for club presidents.

Prime Responsibility	Staff Driver	Committee and Staff Dept Assigned	Target Dates	Preliminary Actions, Research and Design	Review, Follow-up, Testing	Full Implementation
Executive Director	Director of Leadership Dev.	Leadership Development & LD Dept.	October 10 to May 11	Ongoing LD Committee Development	January 2011	Spring 2011

4. **Launch an organizational unified 5 mile walk for Childhood Cancer project, targeting a minimum of 300 Clubs in the first year to conduct the walk, with 15,000 walkers and \$75,000 revenue for CCC. Development of the flyers, messaging, communications and actions to successfully plan, motivate and implement the project.**

**Budget Implication: \$5,000 + ?**

**Progress to date: Referred to Activities Committee for discussion at their next meeting.**

**Marketing Committee: We discussed the value of a shared international experience among clubs and a concern was expressed that the experience should truly have appeal at the “international” level such as Childhood Cancer or environmental issues. If we want to grow on an international level, then the choice of a shared experience should appeal across all country borders.**

**The Strategic Marketing Plan reviewed by the Board in March 2009 presented a goal of determining and developing a “niche, impactful project” to unify and identify Optimist Clubs and assist in marketing to potential Members, partners, sponsors and new Club opportunities (under the category of “Defining the Optimist Product to be Marketed).**

Prime Responsibility	Staff Driver	Committee and Staff Dept Assigned	Target Dates	Preliminary Actions, Research and Design	Review, Follow-up, Testing	Full Implementation
Senior Associate Director	Programs Director	Activities Committee/Programs Dept.	October 10 to June 11	Design, plan, media	October 10 to June 2011	June 2011 Childhood Cancer Month

5. **Organization Consistency plan to target areas of key importance for messaging a constant, clear and focused image/message/voice to the Clubs and members. Areas to be reviewed should include awards and recognition, logo, tagline, directional statements and core values expressed to the Clubs/members. Policy and bylaw proposals to be developed to “lock-in” the strategic messaging and agreed upon direction for up to seven years before review.**

**Budget Implication: \$0**

**Progress to date: Board discussion—December 2010**

**Marketing Committee: The committee agrees the Board should encourage consistency in our “message strategy.” It is important to understand that the message being sent to clubs and their members/leaders includes awards, recognitions, names of campaigns, names of membership tools and Presidential themes. When any of these are changed each year or have names that differ from the umbrella concept of Optimist/Optimistic, then the organization risks gaining an effective response from our club members/leaders and increases confusion about outbound communications directed to them.**

Prime Responsibility	Staff Driver	Committee and Staff Dept Assigned	Target Dates	Preliminary Actions, Research	Review, Follow-up, Testing	Full Implementation
Presiding Board Officer	Executive Director	Board of Directors/ Executive Department	December 2010 to July 2011	Board Discussions & Member feedback	December 2010 to July 2011	March 2011 & Convention 2011

- 6. Adoption of a new organizational wide tagline, “Live the Example”, (which has already been approved) adding...”Because Bringing out the best in kids is only part of it”. Board to review and enhance the tagline. Include the new tagline in our Branding Guide while extensively communicating the new tagline via all media and internal communications focusing on the duo values of helping kids gives members personal rewards and “special moments”.**

**Budget Implication: \$0**

**Progress to date: Board discussion—December 2010**

**Marketing Committee:** Since the committee did not have time to meet after the Charles Jordan Group presentation, the Marketing Committee Chair will give her concerns about this potential change. Any new tagline should be tested against other taglines, in other words, should be based on research rather than a sales pitch. We still have strong connections among our membership with “Bringing out the Best in Kids” and “Friend of Youth.” The costs of changing include the costs of acceptance and adoption at the club and member level. Will this effort add more members or new clubs? If the Board wishes to use this tagline and the overall concept, I suggest that it be used as a club membership campaign theme. This can work at a NOW meeting or within a club’s newsletter where a club member is featured each month, telling a story of how his/her Optimist Club experience has changed him/her. It can be tested here first. Another concept is to use the story appeal addressed in the overall concept and use existing taglines, rather than “Live the Example.” There is power in this approach of sharing stories due to the fact that both rational and emotional appeals typically come to the forefront.

Prime Responsibility	Staff Driver	Committee and Staff Dept Assigned	Target Dates	Preliminary Actions, Research and Design	Review, Follow-up, Testing	Full Implementation
Presiding Board Officer	Executive Director	Board of Directors/Ex. Department	October 2010 to March 2011	Board Discussions & Member feedback	October 10 to March 2011	March 2011

7. Develop, create and implement a professional tutorial for members, using various media including DVD/Online video on “how to” invite new members to join Optimist Clubs and a supporting tutorial on how Clubs can conduct successful membership promotions and NOW projects at the Club level. Tutorial to educate members on a unique and attractive message, in 20 seconds or less, giving the members the tools and voice to express Optimist is “one of life’s greatest opportunities”.

**Budget Implication: \$15,000 to \$20,000 +**

**Progress to date: Referred to Growth Committee**

The Strategic Marketing Plan presented a goal of “implementing a system to retain and grow membership” and this technique would fit within this goal.

The Marketing Committee’s perspective would place this technique online as a resource that could be referenced more easily by a number of club leaders. The concept strives to impact the heart and the mind. The story-driven and emotionally impactful messages suggested by The Charles Jordan Group have relevance here.

Prime Responsibility	Staff Driver	Committee and Staff Dept Assigned	Target Dates	Preliminary Actions, Research and Design	Review, Follow-up, Testing	Full Implementation
Senior Director of Membership	Membership Director	Growth Committee and Membership Department	October 2010 to April 2011	Ongoing Discussions & Member feedback	October 10 to April 2011	April 2011

8. Establish a Presidential and Board Directive that an Optimist International Official “Honors Program” be created. That 2 to 5 Corporations or individuals shall be selected each fiscal year as “Outstanding” leaders in Optimism and service. The selected honorees to be awarded a Presidential Award during the year as possible with the intent and purpose of creating valued partnerships. These potential partnerships be monitored, maintained and fostered to seek synergies in marketing, revenues, Club positioning and corporate patronage.

**Budget Implication: \$2,500 + ?**

**Progress to date: Board discussion**

The Strategic Marketing Plan reviewed by the Board in March 2009 presented a tactic of “developing a recognition program for non-Optimists that have achieved world-class performance.” The focus was on individuals rather than corporations with the thought that a corporate sponsor might be possible in this process.

Prime Responsibility	Staff Driver	Committee and Staff Dept Assigned	Target Dates	Preliminary Actions, Research and Design	Review, Follow-up, Testing	Full Implementation
President	Executive Director	President/Executive Department	October 2010 to September 2011	Ongoing Board Discussions & Member feedback	October 10 to July 2011	July 2011

- 9. HQ securing and utilizing real life stories and special moments of our members on how helping children has helped their lives. Using these stories, images and real life examples, sharing these experiences as a permanent section in the Optimist magazine and other media to focus on solid emotional messages and testimonials to reinforce our work and its effects with children. Using the images of these testimonials in our magazine and website as the organization’s “voice”.**

**Budget Implication: \$ 0**

**Progress to date: Implementation begun w/Oct. 2010 Magazine and other media**

**Marketing Committee: The committee agrees the Board should encourage consistency in our “message strategy.” The consistency embodies visual, verbal and attitude similarities. It consists of techniques which drive our members’ passions about being an Optimist (service to children brings out the best in them, as well as ourselves).**

Prime Responsibility	Staff Driver	Committee and Staff Dept Assigned	Target Dates	Preliminary Actions, Research and Design	Review, Follow-up, Testing	Full Implementation
Senior Associate Director Marketing	Communications/Member Services	Marketing Committee/Communications Department	October onwards	Board Directive, staff implementation	October 10	Winter Magazine

**10. Internal marketing via constant contact, Optimist Magazine, website, PDC’s and other communications tools the co-values of “helping Children improves ourselves” and increase our focus on the duo value proposition, that “you get more out of being an Optimist than you put in”! Implement this duo value proposition as Ol’s single, congruent and long term marketing direction and keystone.**

**Budget Implication: \$0**

**Progress to date: Implementation begun in various media**

**Marketing Committee: Concurs, previously stated.**

Prime Responsibility	Staff Driver	Committee and Staff Dept Assigned	Target Dates	Preliminary Actions, Research and Design	Review, Follow-up, Testing	Full Implementation
Sr. Associate Director Marketing	Communications Director	Marketing Committee/Communications Department	October	Committee inputs and direction	October Onwards	October Onwards

**11. Allocate the staff resources, budget and direction to maintain and increase Ol’s presence and activity in Social Media Channels. Reinforce our initial efforts with Facebook, LinkedIn, YouTube, Twitter, Flickr and other social media channels.**

**Budget Implication: \$1,500 ?**

**Progress to date: Implementation in progress**

**Marketing Committee: Make sure all efforts here are consistent with the organization’s “message strategy” and positioning. Measuring the effectiveness of these efforts should be done on a regular basis.**

Prime Responsibility	Staff Driver	Committee and Staff Dept Assigned	Target Dates	Preliminary Actions, Research and Design	Review, Follow-up, Testing	Full Implementation
Sr. Associate Director Marketing	Director of Social Media/Member Services Director	Marketing Committee/Communications Department	October	Committee inputs and direction	October Onwards	October Onwards

**12. Submitting the SCOPES umbrella concept to the Activities Committee with the directive from the President that the concept be researched and tested.**

**Budget Implication: \$0**

**Progress to date: Referred to Activities Committee for discussion at their next meeting**

**Marketing Committee: Will this form of categorization help us with our message strategy or complicate it?**

Prime Responsibility	Staff Driver	Committee and Staff Dept Assigned	Target Dates	Preliminary Actions, Research and Design	Review, Follow-up, Testing	Full Implementation
Sr. Associate Director Marketing	Programs Director	Activities Committee/Communications Department	October	Committee inputs and direction	October Onwards	Spring 2011

**13. Review and revitalize all communications to make them inspirational, clear, uncluttered, relatable and driven. All communications shall adhere to OI Branding and must inspire and lead members to read, visit and take positive action. The “agreed” upon message shall be the focal point of all communication efforts. Enhance, re-invent and re-think the Optimist magazine, Hotline, Executive Update, Constant Contact and all communications electronic and print materials. Establish a priority that all media should be simple, innovative and effective using the most efficient channels.**

**Budget Implication: \$0**

**Progress to date: Implementation begun in October 2010**

**Marketing Committee: Concurr, previously stated.**

Prime Responsibility	Staff Driver	Committee and Staff Dept Assigned	Target Dates	Preliminary Actions, Research and Design	Review, Follow-up, Testing	Full Implementation
Sr. Associate Director Marketing	Communications Director	Marketing Committee/Communications Department	October	Committee inputs and direction	October Onwards	October Onwards

**14. Development and implementation of methodology to secure member email contact information and cell phone/text contact information for media usage. To increase the current contact list of 24,000 usable email addresses to 50,000 member contacts. Develop strategies and policies to utilize this resource with prudence and skill delivering powerful, inspirational and timely messages to our members.**

**Budget implication: \$0**

**Progress to date: Request for email addresses has begun through various communications channels w/members**

**Marketing Committee: This process is essential if we want to make use of internet-based communication techniques.**

Prime Responsibility	Staff Driver	Committee and Staff Dept Assigned	Target Dates	Preliminary Actions, Research and Design	Review, Follow-up, Testing	Full Implementation
Sr. Associate Director Marketing / Sr. Director Member Services	Communications Director/ Member Services Staff	Marketing Committee/Communications Department	October	Committee inputs and direction	October Onwards	Summer 2011

**15. Manage, adapt, create and foster the e-optimist concept, allowing the “idea” to develop and grow into a resource and asset for Optimist International. Apply resources and guidance as needed while following paths and opportunities that may have never been envisioned by a service organization but could open new possibilities and doorways to serve children and promote our Creed and values.**

**Budget implication: \$0**

**Progress to date: Ongoing**

**Marketing Committee: The committee had lengthy discussions about the e-optimist concept with a strong endorsement for this strategic opportunity. It was felt that a business plan needs to be developed for this potential product/service. Concern was expressed for the sustainability and value of the \$35 membership level. Some strategic thinking occurred on having a menu of tangible merchandise related to Optimistic living be available for sale to reinforce our brand identity and capitalize on the meaning of our name. Ideas about having “free” online content and then an enhanced level has value, but has to be based on an effective business plan.**

Prime Responsibility	Staff Driver	Committee and Staff Dept Assigned	Target Dates	Preliminary Actions, Research and Design	Review, Follow-up, Testing	Full Implementation
Sr. Director Membership	Membership Director	Membership Department	October	Committee inputs and direction	October Onwards	October Onwards

**16. Team members of the St. Louis and Montreal offices will be featured in various means to inform and educate members at large to their duties and accomplishments. Staff updates will focus on responsibilities and duties and highlighted at regular intervals on their efforts, commitment and work.**

**Budget implication: \$0**

**Progress to date: Begun with October 2010 magazine**

Prime Responsibility	Staff Driver	Committee and Staff Dept Assigned	Target Dates	Preliminary Actions, Research and Design	Review, Follow-up, Testing	Full Implementation
Executive Director	Senior Directors	Executive/Marketing	October		October onwards	October Onwards

**17. In order to successfully implement and maintain an effective membership communication model as specifically noted in many of these actions, it is recommended that the OI Board of Directors consider hiring an additional employee under the Senior Director of Marketing. An Interactive Marketing and Communications Manager who would work with the Marketing/Communications team and closely work with the Member Services staff. Key responsibilities would be to increase our marketing focus on the duo value proposition by securing members/ real life stories for use in all print and electronic publications, creating and implementing new marketing initiatives, developing the use of new technologies and assisting with the development and strategic plan for the eOptimist membership program.**

**Budget implication: \$60,000**

**Progress to date: Discussions ongoing with Executive Director and Finance Committee**

**Marketing Committee: This ties in with accomplishing #15 and prior initiatives mentioned.**

Prime Responsibility	Staff Driver	Committee and Staff Dept Assigned	Target Dates	Preliminary Actions, Research and Design	Review, Follow-up, Testing	Full Implementation
Sr. Director Marketing	Senior Director of Marketing	Marketing Comm. and Marketing/Communications Department	October	Committee inputs and direction	October Onwards	March 2011

**18. Reinforce the intention of certification programs offered by the Optimist International Member Services Department (Certified Club Builders and Field Representatives) as a continued vehicle for the growth and strength of Membership through a lasting volunteer service. Provide ongoing oversight to ensure maintenance of volunteer passion and sustainable Member involvement for the present and future.**

**Budget implication: ?**

**Progress to date: Referred to Growth Committee**

Prime Responsibility	Staff Driver	Committee and Staff Dept Assigned	Target Dates	Preliminary Actions, Research and Design	Review, Follow-up, Testing	Full Implementation
Sr. Director Member Services	Director of New Club Building & Member Services	Growth Committee	October	Committee inputs and direction	October Onwards	Dec. Onwards

**19. Added by Marketing Committee Chair: Adopt a “Sales Management” approach and process to New Community/New Club Building. The process includes:**

- Strategic prospecting (generating leads)
- Developing customer relationships
- Closing the “sale”—getting the clubs built
- Follow-up

The review of our “Vital Statistics Data” each year indicates the importance of new club building to our bottom line (serving more kids in more communities and thus spreading Optimism and the ability to add more members via new club building). While we recognize that clubs “are not building clubs like they used to” and some of the key builders from the past are “burned out,” the critical need for NCB still exists.

Where should the organization put its resources to generate more power for our organization? In my opinion, all the efforts we are putting on consistency of message and improving our print publications and website are not as important as recommitting the organization to reaching out to new communities in order to serve more youth and maintain the viability of the organization. This strategic thrust of the organization is unique in that its focus is on relationship building using a “sales” process. To recognize the importance of NCB and its unique sales-oriented features, I suggest the organization consider separating Member Services from New Club Building. Further, I recommend the organization recruit and hire someone with considerable experience in new club building and/or sales management and this individual report directly to the executive director. Many organizations have both a Director of Marketing and a Director of Sales who report to an executive director. This is not meant to be a negative reflection on current staff members handling this function (currently only have one staff member dedicated to this on a full-time basis), but to recognize that greater attention needs to be placed on this mission-driven activity which also affects the organization’s revenues. The awards system also needs to reinforce the importance of new club building. An effective system of selecting, training and motivating builders needs to be developed. The marketing committee spent considerable time discussing the need for greater resources in new club building with the Growth Committee. There appears to be an understanding of problems in execution. The Strategic Marketing Plan presents a goal of “developing a proactive, systematic approach to successfully build new Optimist Clubs” with strategies that have yet to be implemented in a systematic way.

20. Added by Immediate Past President Mark Shriver: To develop a systematic approach to attracting corporate sponsorships and alliances. This goal could be linked with the Programs Department since most sponsorships relate to programs and activities.