

Optimist International Strategic Plan
Adopted by the International Board of Directors December 6, 2008

Vision Statement

Optimist International will be recognized throughout the District as the premier volunteer organization that values all children and helps them to develop to their full potential.

Mission Statement

By providing hope and positive vision, Optimists bring out the best in kids.

Core Values

Our values are reflected in the tenets of the Optimist Creed.

Goal 1: Optimist International will grow to become a thriving, dynamic, progressive organization with members committed to the mission of providing ever-expanding service to the youth, the community and the world.

Objective A. Increase the number of Optimist Clubs to 3,500 by September 30, 2010.

■ **Strategies:**

1. Embark on a rigorous program to build new Clubs within assigned Districts and task the Builders accordingly.
2. Engage the services of fulltime paid Professional Builders who will serve the Districts in addition to the assigned Certified Builders.

Objective B. Increase the annual retention rate of members to 85% by September 30, 2007.

■ **Strategies:**

1. Optimist International will foster and promote awareness among Club leadership to maximize membership retention. Recognize and develop guidance to Club leadership that all members' needs, views, and concerns are important to the health of the Club.
2. Standardize and encourage new member installation, induction, orientation and involvement procedures. Increase utilization of various club rebuilding programs to retain members within weak Optimist Clubs and well as the clubs themselves.
3. Foster methods and develop new programs to increase membership attendance at club meetings.

Objective C. Increase total adult membership to 107,000 by September 30, 2010.

■ **Strategies:**

1. Promote "Friend of Optimist" class of membership directly affiliated to Optimist International. (achieved and ongoing)
2. Develop an ongoing membership recruitment program.
3. Network with other Youth Service Organizations to find common areas for growth such as but not limited to:
 - A. Optimist Class Sailboat Association (to teach kids how to sail) currently in many Countries around the world.

- B. HOBY partnerships
- C. National Association of Secondary School Principals.
- 4. Increase better utilization of Certified Club Builders (CCBs) and develop system to train teams of District CCBs to be responsible for their own District's growth.

Objective D. Increase the number of JOOI Clubs to 800 by September 30, 2010.

■ Strategies:

1. Develop creative District incentives for adult clubs to build JOOI Clubs.
2. Attend professional conferences (Staff to network with other service organizations)
3. Establish unique identity for JOOI (service leadership)
4. Develop Builder of Excellence for JOOI clubs
5. Consider Regional Conferences for JOOI members during spring break or summer sessions that will build the core values of Optimist International
6. Solicit Corporate sponsorships for funding

Goal 2: Maximize the effective and efficient administration and operation of Optimist International.

Objective A. The Board of Directors will conduct reviews of staffing and facilities to maximize the effective and efficient administration and operation of Optimist International.

■ Strategies:

1. Determine and fund internal and/or external staffing to provide critical services and products.
2. Determine and fund appropriate facilities to maximize the effective and efficient administration and operation of Optimist International.

Objective B. Improve the current methods of communication to provide information that is timely, basic, and relevant.

■ Strategies:

1. Short-term:
 - a. Prior to each meeting of the Board of Directors, copies of the agenda will be provided to all Vice Presidents and Governors.
 - b. Conduct teleconferences every other month with members of the Board and the Vice Presidents. A specific agenda would be established for each call addressing Board matters and Vice Presidents' issues.
 - c. Continue the Town hall meetings and the Board of Directors workshops at the International Convention.
 - d. Complete the update of the OI website to make it more "user-Friendly."
 - e. During orientation for new Board members and Vice Presidents, include discussion and instruction of computer use and implementation.
 - f. Provide "educational" information about the Board of Directors to leaders and members, i.e. Its role, function, decision-making, etc. in order to promote better understanding of its role within Optimist International.

2. Mid-term:
 - a. Determine the feasibility of implementing video conferencing utilizing the Skype or other similar software systems
 - b. The addition of a “chat room” feature on the Optimist International website for discussion of issues/questions between members and the Board of Directors
 - c. Utilize existing/other software programs to create training presentations (by CTs and CCs) which can directed to Districts, Zones, or Clubs
 - d. Develop a monthly newsletter to supplement the OI magazine
 - e. Consider the use of video for the International Convention and for meetings of the Board of Directors.
3. Long-term:
 1. Increase the magazine’s distribution to 6 or 8 per year, with a concerted effort to sell advertising to cover the additional expense.

Goal 3: Consider, design, and implement Optimist programs that will focus on realizing the vision of Optimist International in four core areas: Growth, Education, Communications, and Activities.

Objective A. Implement an ongoing process of assessing and evaluating all International Programs and Policies for consistency with the Mission, Vision and Purposes of Optimist International.

■ Strategies:

1. Evaluate Club programs, and recommend to the Board, for inclusion for District and International implementation. (ongoing).
2. Formulate new International Programs consistent with Optimist International’s Mission , Vision and Purposes of Optimist International, and seek Board approval for implementation. (ongoing)
3. Review the Purposes of Optimist International to ensure long-term relevance of both purposes and programs.

Objective B. Develop and Implement worldwide program(s) to encourage Optimists to actively participate in projects that maximize character-development of youth and community improvement.

■ Strategies:

1. By October 1, 2008 Optimist International will adopt appropriate Policy and actively encourage all Optimists worldwide to focus on participating in projects that are geared towards character-development of youth and community improvement.
2. Optimist International will implement a system to record, evaluate, and support efforts geared towards achieving strategy i) above with ongoing feedback to members at quarterly intervals using the most efficient media.
3. Work to publish materials for teaching youth (JOOI) the principles of personal worth and personal missions.
4. Work with Institutions of high learning (Universities) to research methods of enhancing life styles and quality of life through optimism.

Objective C. Continue and enhance a system of reports and recognition for successful new programs that are implemented by Clubs.

■ Strategies:

1. Develop an online system of evaluation to be placed on an Optimist leadership website or similar vehicle.

2. Ensure that appropriate recognition systems are in place for all Districts to reward excellence. Completed.
3. Encourage “Club Project Awards” to be presented in electronic formats for easy loading and accessing from our websites.

Goal 4: Develop and implement a Strategic Marketing Plan to create global awareness of the Mission/Vision and Core Values and provide positive support for the growth and sustainability of Optimist International. See Annex A. (Completed July 08 and ongoing; see Annex A).

ANNEX A: STRATEGIC MARKETING PLAN

ANNEX B: HISTORICAL RECORD OF COMPLETED OR DELETED GOALS, OBJECTIVES

SUMMARY OF CHANGES TO THE STRATEGIC PLAN adopted December 6, 2008:

1. Moved Goal 3 (growth) to become Goal 1. Discuss this goal in detail at the December Board meeting.
2. Moved Goal 1 (marketing) to become Goal 4, and attached the Strategic Marketing Plan as an Annex A. This goal is essentially completed, but on-going. The wording for this goal will be addressed at the March 2009 Board meeting.
3. Added Objective D to Goal 2. The strategies are currently being addressed by ad hoc committees.
4. Added Objective E to Goal 2. New objective and strategies added per Board direction 1 July 2008.
5. Move Goal 4 (programs) to become Goal 3.
6. For historical purposes, we will track completed/deleted goals in an Annex B. This will provide a background for decision making. Moved Goal 2's Objectives A, B, and C from the main plan to this Annex. See below
7. Completed/deleted goals for Marketing are not included in this Annex since this goal is still a work in progress and the Strategic Marketing Plan has taken its place in Annex A.
8. Completed goals as of December 2008:
 - Create a Charter Officer Program and one staff position to support it. (Completed May 07)
 - The Board of Directors will prepare, in consultation with affected Districts, and implement by September 30, 2008 a plan for the consolidation of Districts, merging current Districts in a compatible way as required. Completed October 2008.
 - The Board of Directors will prepare and submit a proposal to the delegates of the 2007 International Convention in Montreal for the establishment and operation of permanent Regions of Optimist International subject to realignment as necessary and determined by the Board of Directors and further provide for the election of Vice Presidents-Elect for these Permanent Regions from the Clubs in each such permanent Region. Completed March 2007.
 - The Board of Directors will develop and publicize differing methods and concepts for Club governance and that Clubs are encouraged to be bold, creative, and progressive in establishing Club governance, by September 30, 2007. Completed July 2007.
 - Develop a resource library online of successful/best practices projects, fundraisers, and recognition programs. Completed.
 - Devise a system to encourage clubs to develop programs with the ultimate goal of their programs(s) becoming an official OI program. Completed.