

Michigan District Optimist Long Range Plan 2020-2024



Gary London
2020-2024
Committee Chair

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Acknowledgements

The Michigan District Optimist acknowledges the support, commitment and collaboration of the stakeholder teams and facilitators who enabled us to develop our Strategic Plan using the SWOT-AR (strengths, weaknesses, opportunities, threats, aspirations/vision, results) Framework.

According to Michigan District Policy, the Long Range Planning (LRP) Committee shall be made up of five members each with a three-year appointment. The Governor shall appoint persons of leadership and ability to serve as vacancies occur.

The committee shall consist of a Past Governor, a Past District Secretary/Treasurer, a Present or Past member of the Finance Committee, and two members at large who are members in good standing and possess the appropriate leadership skills. The Governor and Governor-Elect shall act as advisory members to this committee. The chairperson shall be appointed by the Governor from the members of the committee.

2019-2020 Long Range Planning Committee

Gary London, Committee Chair (1st year)
Ted Dotts, Past Governor (3rd year)
Linda K. Ingersoll, Past Secretary / Treasurer (2nd year)
Margaret A. Rollinger, Finance (2nd year)
Stephen A. Sucher, At Large (1st year)

2019-2020 Advisors

Pamela Barckholtz, Governor
Cathy Balik, District Secretary
Jeff Maatman, District Treasurer
Ted Dotts, Immediate Past Governor
Debra Berry, Governor-Elect

2019-2020 Sub-Committees

Membership Retention: Linda Ingersoll and Ted Dotts
Membership Growth: Cheryl Thames and Cathy Balik
New Club Building: Margaret Rollinger and Pam Barckholtz
Marketing: Gary London and Jeff Maatman
Leadership Development: Steve Sucher and Debbie Berry

2020-2021 Long Range Planning Committee

Gary London, Committee Chair (2nd year)
Pamela Barckholtz, Past Governor (1st year)
Linda K. Ingersoll, Past Secretary / Treasurer (3rd year)
Margaret A. Rollinger, Finance (3rd year)
Stephen A. Sucher, At Large (2nd year)

2020-2021 Advisors

Debra Berry, Governor
Michelle Kauffold, District Secretary/Treasurer
Pam Barckholtz, Immediate Past Governor
Dan Mills, Governor-Elect

2020-2021 Sub-Committees

Membership Retention: Linda Ingersoll, Cathy Balik
Membership Growth: Michelle Kauffold, Debra Berry
New Club Building: Margaret Rollinger, Pam Barckholtz
Marketing: Gary London
Leadership Development: Steve Sucher, Dan Mills

2021-2022 Long Range Planning Committee

Gary London, Committee Chair (3rd year)
Pamela Barckholtz, Past Governor (2nd year)
Past Secretary / Treasurer (1st year)
TBD, Finance (1st year)
Stephen A. Sucher, At Large (3rd year)

2021-2022 Advisors

Governor
District Secretary
District Treasurer
Immediate Past Governor
Governor-Elect

2021-2022 Sub-Committees

Membership Retention:
Membership Growth:
New Club Building:
Marketing:
Leadership Development:

2022-2023 Long Range Planning Committee

Committee Chair (1st year)
Pam Barckholtz Past Governor (3rd year)
Past Secretary / Treasurer (2nd year)
Finance (1st year)
At Large (1st year)

2022-2023 Advisors

Governor
District Secretary
District Treasurer
Immediate Past Governor
Governor-Elect

2022-2023 Sub-Committees

Membership Retention:
Membership Growth:
New Club Building:
Marketing:
Leadership Development:

2023-2024 Long Range Planning Committee

Committee Chair (2nd year)
Past Governor (1st year)
Past Secretary / Treasurer (3rd year)
Finance (2nd year)
At Large (2nd year)

2022-2023 Advisors

Governor
District Secretary
District Treasurer
Immediate Past Governor
Governor-Elect

2022-2023 Sub-Committees

Membership Retention:
Membership Growth:
New Club Building:
Marketing:
Leadership Development:

Introduction

The Michigan District Optimist (*also referred to as the District*) was created by community leaders to provide operational and training support and growth to the more than 100 Optimist Clubs and its members in the lower peninsula of Michigan. Each Optimist Club provides support for the children in our communities.

The District strives to “bring out the best in youth, community and ourselves” through philanthropic donations to the children in our communities as well as through Optimist International Foundation (OIF) to larger causes such as Youth Appreciation, Childhood Health and Wellness, Childhood Cancer Campaign, Essay and Oratorical Contests, Communication Contest for the Deaf and Hard of Hearing and Junior Golf Championship.

The Long Range Plan/Strategic Planning Committee will meet quarterly to ensure implementation of the plan.

Mission

By providing hope and positive vision, Optimists bring out the best in our youth, in our communities, and in ourselves.

To help clubs succeed by providing support and leadership to Michigan Optimist Clubs through strategic relationships, education, mentoring, resources, marketing and effective and timely communication.

Vision

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

Purpose

The purpose of the Michigan District is to function as an administrative division of Optimist International in furtherance of the purposes of Optimist International, the Bylaws, and Policies as established by the International Board of Directors. The Michigan District shall provide service and support to Clubs for the purpose of enhancing growth, participation, administration and youth service.

The Optimist Creed

Promise Yourself - -

- To be so strong that nothing can disturb your peace of mind*
- To talk health, happiness and prosperity to every person you meet*
- To make all your friends feel that there is something in them*
- To look at the sunny side of everything and make your optimism come true*
- To think only of the best, to work only for the best, and to expect only the best*
- To be just as enthusiastic about the success of others as you are about your own*
- To forget the mistakes of the past and press on to the greater achievements of the future*
- To wear a cheerful countenance at all times and give every living creature you meet a smile*
- To give so much time to the improvement of yourself that you have no time to criticize others*
- To be too large for worry, too noble for anger, too strong for fear, and too happy to permit the presence of trouble.*

SWOT -AR Analysis

The following dimensions comprise this analysis:

- Leadership Development provides the foundation. Our organization needs leaders in order to function. We need to develop our future leaders for the survival of the organization.
- Marketing is important to promote our organization. Our communities need to know about our organization and how we make a positive impact.
- New club building is important so our services can be brought to areas that are not presently served or to expand our scope within areas served.
- Membership growth is needed to reach more youth within a community.
- Membership retention is important to the survival of our organization. We cannot provide services to our communities without these dedicated volunteers.



SWOT -AR Analysis

Priority # 1 Membership Retention:

Strengths	Weaknesses	Opportunities	Threats	Aspirations/Vision	Results
Personal Growth and Involvement (PGI) / Professional Development Program (PDP)	Not being used by clubs, possibly due to lack of support of leadership	Schedule a PGI presentation at least quarterly for the club		Personal Growth and Involvement (PGI) / Professional Development Program (PDP)	Members are re-energized and more involved. Knowledge of their club and the District has increased.
Member Orientation	As members are added to a club, information on the organization or club activities is not provided	Assign a club-level membership chair Schedule a Member Orientation event at least annually	If members do not feel valued, they may drop	New members participate in club activities and feel part of the organization Long-time members are re-energized and stay actively involved	Clubs retain members
Club & District Meetings that are fun and informative	Meetings that focus mainly on business items cause members to lose interest	Use member interest surveys to determine possible fellowship activities and topics for speakers Involve the District Club Fitness committee to address issues	Members stop attending and are no longer engaged Non-payment of dues	Problems are addressed Clubs are active and healthy Less than 10% loss of membership	Clubs retain members

Strengths	Weaknesses	Opportunities	Threats	Aspirations/Vision	Results
Optimist Mentoring Program	This was created by OI but no longer included in training materials	District Membership Committee along with other District committees i.e. Leadership Development and Club Fitness could reinstate the program for use by clubs	If new members are not mentored, they are not aware of the importance of their inclusion in an Optimist club.	Members are educated on all aspects of being an Optimist and become engaged and active at club and District levels.	Clubs retain members

SWOT -AR Analysis

Priority # 2 Membership Growth

Strengths	Weaknesses	Opportunities	Threats	Aspirations/Vision	SOAR Results
<p>New Optimists Welcome (NOW) Chair to encourage growth</p>	<p>- None</p>	<p>Use OI NOW program resources to ensure successful event</p> <p>Promote compliance to number of NOW events annually by each club</p> <p>NOW Chair to provide training and support to clubs on how to conduct and effective NOW Event/Gathering</p> <p>District Membership and Communication Chairs develop a motivational Club Level plan to recognize new members and their sponsors</p>	<p>- None</p>	<p>Create incentive plans to improve attendance and membership numbers</p> <p>Two (2) NOW events held by every club in the District annually</p> <p>All clubs meet or exceed Honor Club status</p> <p>20% increase in membership growth</p>	<p>Membership growth which will result in an increase in the number of children/youth that we serve</p>

Strengths	Weaknesses	Opportunities	Threats	Aspirations/Vision	SOAR Results
<p>Clubs offering alternative/innovative meeting times</p> <ul style="list-style-type: none"> - Social Hours - Meetups - Add Morning/Lunch/ Evening Meetings 	<p>Some members rarely in attendance at the same meetings</p>	<p>Greater focus on generation gaps, diversity, and inclusion</p> <p>Expand our Reach:</p> <ul style="list-style-type: none"> - to a larger audience of intergenerational groups - to more diverse and inclusive groups including cultural, race, religion, and sexual orientation 	<p>Members inability to be effective communicators and bridge the "What's In It For Me" (WIIFM) gap doing PR & Networking opportunities</p>	<p>To grow our membership by .5% annually</p>	<p>Net membership growth by greater than or equal to +100 annually</p>

Strengths	Weaknesses	Opportunities	Threats	Aspirations/Vision	SOAR Results
Largest District in Optimist International	<p>Building non-sustainable clubs to receive Builders Of Excellence (BOE) credit and/or achieve distinguished status</p> <p>Lack of transparency, details, full disclosure and forthrightness when building new clubs</p>	<p>Place greater emphasis on personal values like quality, honesty and integrity</p> <p>Educate and focus on Purpose Driven Optimist Clubs</p> <p>Embrace and promote OPERA for a more positive state of well-being: Optimism, Purpose, Engagement, Relationships, Accomplishments/Achievements</p>	<p>Negative perception of our organization</p> <p>Potential members seek other service organizations to join</p> <p>Decreased membership and could lose our standing as largest district</p>	<p>All new clubs built remain active and in good standing for at least five (5) years and all new members are well informed and embrace our organization as the premier youth serving organization that they want to be a part of.</p> <p>Quarterly and annual number of members added is greater than the number of members deleted</p>	<p>Fewer children and youth served</p> <p>No clubs are disbanded within 2nd and/or 3rd years of being organized</p>
Number of clubs that achieve Honor & Distinguished status annually	Adding people to club rosters with no true interest in the purpose of our organization just to achieve distinguished status (adding in September and deleting in October)	Membership growth, more healthy clubs, less clubs at risk.		Encourage more clubs to achieve these recognitions honestly	More youth are served
Recognize and reward sponsors of new members	Current recognitions are not meaningful to encourage membership growth	Increase club, community, and district level recognition.	Cost of printing and mailing recognition		More children/youth being served.

SWOT -AR Analysis

Priority # 3 New Club Building (NCB)

Strengths	Weaknesses	Opportunities	Threats	Aspirations/Vision	Results
Builders of Excellence (BOE)	<p>BOEs of new clubs not providing follow up</p> <p>No clear plan</p> <p>Little training for BOE's</p>	<p>Track and support clubs that have been recently built and insure BOEs are following the plan</p> <p>Plan can be improved</p> <p>Training for BOEs can be improved</p> <p>NCB materials provided by OI NCB Committee in conference packets</p>	<p>Worrying about recognition more than new services</p> <p>Cost of membership</p>	<p>10% new clubs built annually and strategically</p> <p>BOEs can share how Optimist membership can be supported with cash, donations, sweat equity, gifts, or other</p>	<p>Membership growth in both number of clubs and number of members, which will result in an increase in the number of children we serve</p> <p>Branding becomes evident in-service projects</p>
Members in multiple clubs bring experience and knowledge to each club	Multiple club memberships not always supporting a new club or resulting in more children being served	<p>Identify growth areas using map visual</p> <p>Provide guidance for multiple members to support all the clubs they belong to</p>	Multiple members serve with that club on paper only	Multiple members spend at least 3 hours per month in service with each club membership	Multiple membership is valued and valuable to the communities and to the organization

Strengths	Weaknesses	Opportunities	Threats	Aspirations/Vision	Results
Building a club within a club allows for membership growth without the overhead associated with the building of a new club	Impossible to recognize those members within Optimist Leaders	Club within a club allows members to join that might not have joined the traditional club (e.g. they are only interested in a special project or activity) Provide a method for club within a club members to be identified on club roster (e.g. separate column in spreadsheet)	Loss of that special program or activity may lead to membership decline Special classification may cause communication issues	Clubs within a club will support special projects as well as the projects of the larger club in some way	Increased membership Increased numbers of children served
Building a club supporting adults with exceptionalities that supports diversity and more inclusion	Additional support may need to be provided Adults with exceptionalities may feel discriminated that they are not allowed to join a traditional club (e.g. may not feel welcome or guided away)	Build collaborative partnership with: 1. Special Olympics Community 2. Post-secondary special ed departments (e.g. students aged 19-26) 3. Build relationship with Intermediate School Districts, Regional Education Support Agencies, and Community Mental Health Organizations	Sponsoring club may not be able to provide additional support that is required	Smashed stigma and increased diversity	Increased membership more inclusion, and more acceptance Can provide assistance for traditional club projects

Strengths	Weaknesses	Opportunities	Threats	Aspirations/Vision	Results
First Nations people are included in membership	Difficult to engage	Indigenous club with First Nations people involved	Must have good relationship with tribe and general membership must be tolerant of differences	More inclusion and diversity Many lessons to be learned Indigenous youth will have support for their activities	Increased membership Broader understanding
LGBTQ population will be represented	General membership may have difficulty understanding and accepting	Rainbow club will be included in Michigan District	Willingness to accept may be hampered by personal beliefs	More inclusion and diversity	Increased membership and acceptance
Online clubs reach beyond district geographic borders	Must have access to online resources and technology	Online clubs attract younger members that do not want to go to meetings.	Technology challenges (e.g. unstable internet)	Multitude of creative opportunities Zoom meeting and other platforms	Increased membership Reaching those in remote areas or those with mobility issues

Strengths	Weaknesses	Opportunities	Threats	Aspirations/Vision	Results
Adults in special groups/communities could be included and could support multiple services	Lack of intergenerational diversity causes an inability to effectively communicate with other groups	Arts, Sports, STEAM, Retired Communities	Members will leave who are not receptive to the expanded focus	To expand our reach through planned engagements with targeted communities to attract potential new members, increase our service to underserved communities, identify needs and promote a greater interest in purpose driven clubs.	Increased membership. Expanded services Enhanced positioning worldwide as the premiere volunteer service organization that values all children and helps them develop to their full potential

SWOT -AR Analysis

Priority # 4 Marketing

Strengths	Weaknesses	Opportunities	Threats	Aspirations/Vision	Results
Corporate Sponsorship - Corporate Sponsor of the Year	MI District not maximizing this	Sponsor all of our events and have direct marketing to our 2,800 members	Financial health of corporate sponsors may prevent future sponsorships	Corporate Sponsors look forward to sponsoring all of our events as they are advertised throughout the district	All club and MI events are fully funded
Branding community recognition	Best Kept Secret - not recognized throughout the community	Get the community involved Promotion of our organization	not recognized not sponsored	People in our community know us and want to be a part of what we are doing	Growth
Social Media - We have a website	we are not reaching the community as well as we should	Use: Facebook and other social media to better promote Optimist Clubs	not known not going to grow	Our communities know us and want to be part of what we are doing	Growth

SWOT -AR Analysis

Priority # 5 Leadership Development

Strengths	Weaknesses	Opportunities	Threats	Aspirations/Vision	Results
Largest District in Optimist International. Recognized for our leadership	<p>52% of our members have only been in our organization for 5 years or less which implies they may not understand our organization and be able to lead.</p> <p>Clubs and members do not understand the value the District provides</p>	Many leadership opportunities exist at club, District, and International levels	Without good leadership our organization will eventually fail	Over 75% of our clubs will be (are) taking officer elect training annually through the Leadership Management System (LMS)	<p>Leadership skills have improved.</p> <p>More members are willing to step up to a leadership role.</p> <p>100% results reporting to the District & OI via vehicles such as President's Pride Report and Club Officer Elect Report</p>

Strengths	Weaknesses	Opportunities	Threats	Aspirations/Vision	Results
<p>Many members have served in a leadership role at District level</p>	<p>17% of our clubs have been in existence for 5 years or less which implies they may not understand our organization and may need help in leadership skills</p> <p>Expectations are not always clearly defined</p>	<p>We can increase the leadership skills at the club level which can encourage those skills at a district level</p> <p>Make sure new clubs are well supported for their first 3 years</p> <p>Promote Optimist International Leadership Academy</p>	<p>Without members taking on district leadership roles, our organization will be weakened</p> <p>Change means doing something you may feel uncomfortable doing</p> <p>Change means may lose real estate they do not want to liquidate</p> <p>Change means may have to yield a position they do not want to give up</p>	<p>Membership is wanting to serve in a district leadership role</p>	<p>Goal orientated and highly educated Leadership team across the District</p> <p>Good managers of time and resources</p> <p>Culture of respect - everyone is treated as equals and fairly</p>

Strengths	Weaknesses	Opportunities	Threats	Aspirations/Vision	Results
Lots of Optimist knowledge within the organization (club, district, and international levels)	<p>Lots of Optimist knowledge that is not being shared</p> <p>Our size - membership perceives someone else will step up to do the work.</p> <p>Many of our membership are afraid to serve in a leadership position at the club or district level</p>	<p>Utilize projects to involve members and grow leadership skills</p> <p>Utilize technology - do more training online, training is delivered at a convenience</p>	<p>It takes a village to make this work. We need to make sure we have a village.</p> <p>Some clubs keep some officers in a role for too long.</p> <p>Clubs may not be prepared for a vacancy in a role.</p>	Members are willing to become a club, district, or international leader	Strong leadership and organizational knowledge
Members have participated in the Personal Growth and Involvement (PGI) and/or Professional Development Program (PDP) to encourage member education and increased knowledge of OI	<p>Less than 400 members have participated in the PGI program. These programs are not effectively being promoted.</p>	<p>Promote PGI & PDP by displays of members' progress, pin backs, & certificates at meetings.</p> <p>Presentation of awards needs to be timely.</p>	<p>Have to have other methods to replace PGI</p> <p>PGI & PDP not tied to District training.</p>	Most of our members will have attained level 10 of the PGI program	Members will have improved their leadership skills, learned more about our organization, and increase membership

Strengths	Weaknesses	Opportunities	Threats	Aspirations/Vision	Results
Our district has many leadership roles to spread the work (e.g. Lieutenant Governors, District Committee Chairs)	Some members perceive not being capable or not being trained. Too many members repeat in a position and do not allow someone else to try the role (consider being a mentor).	Try to position team members by interests, skill sets, experiences, and/or strengths. These can be determined by personal knowledge, interest surveys and phone calls	May not be able to fill a role	Members are jumping at the opportunity to serve	Roles are clearly defined. All district roles are filled with trained members
Many certified trainers in the District	Certified trainers are not being utilized	Utilize certified trainers	We would be relying on training by someone that is not qualified	Communicate the value of certified trainer (CT) classes and instructors	The District has available certified trainers
The Michigan District has a Past Governor Association (PGA)	Past Governor Association not being very active Michigan District Governor-Elect manual not being maintained	Identify pool of ready now/ready future district leaders Identify and encourage members to become certified trainers Michigan District Governor-Elect manual is being maintained	This group may tend toward the “We always did it that way” attitude which can stagnate the organization	Governor-Elect candidates will be on a self-directed leadership development path to District Governor-Elect	The MI District will have an ongoing 2 or more-year Governor-Elect succession plan.

2020-2024 Michigan District Critical Goals

Critical Goal # 1: Membership Retention

What are the necessary steps to achieve this goal?

Strategies/Actions	Timeline	Assigned To	Partnerships	Start Date	Due Date
Promote the PGI/PDP Programs at the District and club levels	Ongoing	District PGI Chair	Governor Assistant Governors Lt Governors	10/1/2020	9/30/2025
Encourage every club to assign a PGI/PDP chair and conduct 4 Member Orientation events annually	Ongoing	Lt Governors	District PGI Chair Assistant Governors	10/1/2020	9/30/2025
Develop and maintain a member Mentoring Program	10/1/2020	Membership Chair	District PGI Chair Lt Governors Assistant Governors	10/1/2020	9/30/2025

Critical Goal # 2: Membership Growth

What are the necessary steps to achieve this goal?

Strategies/Actions	Timeline	Assigned To	Partnerships	Start Date	Due Date
Implement innovative plan to improve membership growth	10/1/2020 to 9/30/21	Membership Committee	Finance Committee	10/01/2020	12/31/25
Encourage every club to conduct 4 NOW events annually	10/1/2020 to Labor Day	Now	Membership Committee Club Fitness Advisor	7/11	Labor Day
Assist all clubs to meet or exceed Honor Club status	Ongoing	Lt. Governors	Assistant Governors Club Fitness Advisor	10/1/2020	9/30
Recognize and reward sponsoring members	10/01 to 9/30	Membership Committee	Members	10/1/2020	9/30

¹ Based on a 15-month planning year

Critical Goal # 3: New Club Building

What are the necessary steps to achieve this goal?

Strategies/Actions	Timeline	Assigned To	Partnerships	Start Date	Due Date
Support the Governor's NCB Plan	Ongoing	NCB Committee as determined by Governor	BOE's Governor Certified NCBuilders	10/1/2020	9/30/2025
Develop NCB packet that can be personalized for each NCB effort	10/1/2020	NCB Committee	BOE's Governor	10/1/2020	9/30/2025
Increase the number of Certified Club Builders in the District by 1 per year	Ongoing	Leadership Chair	Michigan District and OI	10/1/2020	9/30/2025
Have a member attend NCB training annually	Ongoing	NCB Committee	Lt Governors	10/1/2020	9/30/2025

Critical Goal # 4: Marketing

What are the necessary steps to achieve this goal?

Strategies/Actions	Timeline	Assigned To	Partnerships	Start Date	Due Date
Send out email questionnaire	30 days	Marketing Committee	Governor	04/25/2020	05/25/2020
Convert email results to LRP Dashboard	15 Days	Marketing Committee	LRP Committee	05/28/2020	06/12/2020
Establish District Marketing Committee	30 days	Next Administration		10/01/2020	10/31/2020
Develop fully-funded corporate sponsorships	5 year plan	Marketing Committee	Michigan Chamber of Commerce	10/01/2020	09/30/2025
Promote branding of Optimist International within the District	5 year plan	Marketing Committee	Optimist International and all clubs	10/01/2020	09/30/2025

Critical Goal # 5: Leadership Development

What are the necessary steps to achieve this goal?

Strategies/Actions	Timeline	Assigned To	Partnerships	Start Date	Due Date
<p>Leadership selection should be based on a balance of experience, ideas & accountability and by Club Officers to identify upcoming leaders within the Club, Zone, etc.</p> <p>Collect and send data to Candidate Qualifications Chair</p>	On going	Lt Governors	<p>Assistant Governors</p> <p>Past Governors Association</p>	Ongoing	Ongoing
<p>Assess current Committee structure and function to determine the need for adjustments to better align with today's environment</p>	Gov Elect Year	Governor Elect	Past Governors Association & Mentors	10/1/20	Before Q3 conference

Strategies/Actions	Timeline	Assigned To	Partnerships	Start Date	Due Date
Develop/Maintain a leadership database to track qualified District leaders. Selection should be based on a balance of experience, ideas & new blood	Ongoing	Past Governor Association Chair	Past Governors District Historian	10/1/20	Ongoing
Promote the new Learning Management System	Ongoing	Governor Elect	Governor Lt Governors	10/1/20	Ongoing