December 2015

TO: Members: Executive Committee, Board of Directors, and
Strategic Planning Committee

FR: Richard L. Hayes, Chair, WLO Strategic Planning Committee

RE: Strategic Planning

. . . strategic planning is a process by which we can envision the future and develop the necessary procedures and operations to influence and achieve that future. Clark Crouch

This document extends a process begun more than a decade ago with the production of WLO's strategic plan entitled *A World Fit for Living: World Leisure Priorities for People 2004-2008**. This plan identified four priorities for the organization including: 1) heightening the awareness of leisure benefits; 2) improving policy and legislation; 3) strengthening leadership; and 4) expanding international cooperation. Each of these priorities was supported with a list of action steps. In turn, the results of the work of the organization was evaluated in terms of the progress made in achieving identified activities.

In 2008, another strategic planning initiative was undertaken resulting in a document entitled *Leisure: Enhancing the Human Condition ~ Priorities and Strategies, 2009-2014.* Building on the previous strategic plan, this initiative identified six (6) goals or priorities including: 1) linking to UN Millennium Goals (MDGs); 2) enhancing research and scholarship; 3) advocating for leisure; 4) expanding educational opportunities; 5) strengthening partnerships and collaborative relationships; and 6) expanding membership. These goals and priorities were then, in turn, supported by an extensive list of action steps.

In establishing a new strategic plan for WLO, the following initial steps and preliminary timeline were established as follows:

Oct 2013 — **WLO BOD Establishes Strategic Planning Process** to include Board members, professional staff, and key stakeholders

Oct 2013 — **Review of Strategic Orientation/Philosophy/Vision/Values** to ensure alignment **of** basic philosophy, programs, services, and structure

Dec 2013 — **Future Forecast/Environmental** Scan including SWOT Analysis and Identification of Key Issues, Questions and Choices to be addressed

Mar-May 2013 — **Importance/Performance Analysis of WLO Programs, Services and Structures** to evaluate the importance and performance of programs and services, financial initiatives and other factors

Oct 2013 — **Analysis of 2009 – 2014 Strategic Plan** suggested that great progress has been made in advancing the priorities and goals of WLO.

*Edginton, C. R. & Coles, R. (2009). *Leisure: Enhancing the human condition--Priorities and strategies, 2009-2014*. World Leisure Secretariat, Cedar Falls, Iowa USA. 1-20.

March 2014 **Priorities/Goals** were identified that focus on a variety of concerns including programs and services; resource development/management; the status or stature of the organization; the building of partnerships, affiliate relationships and cooperative/collaborative relationships; governance activities; and organizational infrastructure.

- **UN Sustainable Development Goals ~** Alignment with the UN's post 2015 MDGs focused on sustainable development should be a major initiative within the World Leisure Organization (WLO).

- **Enhanced Relationships with the UN and UNESCO ~** Continued efforts at linking WLO with the UN and rebuilding our relationship with UNESCO should occur including building stronger relationships with the UN World Tourism Organization, World Health Organization, World Trade Organization, etc.

- **Craft a Focus on UN/UNESCO Priorities ~** This currently includes Africa, gender equality and sustainable development goals.

- **Enhanced Relationships with Regional Intergovernmental Bodies ~** Additional emphasis should be placed on building relationships with intergovernmental agencies such as the European Union, African Union, the Union of South American Nations and Commonwealth of Nations.

- **Governance Structure ~** A review of WLO's Governance Structure should be undertaken during the 2015 – 2020 strategic planning process. Questions regarding the nature and types of membership as well as the role and size of the Board of Directors and policies should all be reviewed.

- **Partnership Activities ~** Greater attention should be paid to developing strategies to enhance partnership activities (e.g., affiliate organizations, shared interests, and international associations). Such strategies could be useful in building the membership base of the organization as a way of expanding WLO's sphere of influence.

- **Marketing of Global Events ~** Activities aimed at enhancing the branding of World Leisure's global events including WLO's congresses, conferences and summits, WLO Games and WLO Festivals should be undertaken.

- **Informational Products and Services ~** WLO should identify specific projects that create opportunities for information databases that can be shared or purchased. For example, information regarding the economic impact of leisure on a worldwide basis could be considered. Other types of information might include the linkage of leisure to health and its relationship to social and cultural development.

- **Expansion of Use of Social Media to Advocate for Leisure ~** Aggressive enhancement to WLO's social media portals (e.g., Facebook, Twitter) as a way of expanding efforts to advocate for leisure should be undertaken.

- **Enhancing Educational Opportunities ~** The WLO network of educational programs should be expanded to encourage WLO Centers of Excellence on all continents. In addition, efforts should be undertaken to implement a full program of educational services.

- **Organizational Fiscal Sustainability ~** A development of strategies to enable long-term sustainability of WLO's fiscal resources should be undertaken.

- **Review WLO Program Structures** ~ A review of WLO's program structures including WLO Board of Directors, WLO Commissions, WLO Chapters and the WLO Academy should be undertaken. Factors related to the organizational roles for each of these groups should be reviewed e.g. should the WLO Commissions be given the responsibility for selected program implementation? Should the WLO BOD members be responsible for specific program areas?

- **Succession Planning for Leadership** ~ Strategies for succession in leadership roles on the WLO Board of Directors, WLO Commissions, WLO Chapters and the WLO Academy should be developed.

July-Sept 2014 **Action Steps** created support of the goals and priorities to provide a detailed work path for the strategic plan and more specific activities that can be addressed.

Nov - Dec 2014 **Writing of Strategic Plan as a Planning/Promotions Document** that provides a document to guide the work of the organization over a specific period of time, detailing priorities, goals and actions to be taken and serves as a promotional publication aimed at advancing a greater understanding of the organization and its intentions. In particular, the Committee (i.e., Richard Hayes, Mike Dow, Ricardo Uvinha, Geof Godbey, Karla Henderson, Aurelia Kogler) have been charged with framing the document (e.g., mission/vision, goals, action steps, timeline, promotion of leisure values) and providing salient documents (e.g., Charter for Leisure, Sao Paulo Declaration on Leisure and Globalization).

Jan 2015 **Review and Revision by the Strategic Planning Committee** for submission to WLO Board of Directors for review and comment.

Feb 2015 **Procedures for Monitoring/Modifying Strategies** established to enable a review of priorities, goals and action steps by the Board of Directors annually from 2015 forward.

Apr- May 2015 **Board of Directors Reviews and Recommends** necessary additions, revisions, modifications, and deletions from draft strategic plan and forwards recommendations to Strategic Planning Committee for preparation and publication of the final Strategic Plan 2015-2020,

Jun 2015 **Strategic Planning Committee Prepares Planning Workshop** in collaboration with the Secretariat prior to final approval by the Executive Board.

Sept 2015 **Strategic Plan Reviewed by Board of Directors** in strategic planning workshop in Laixi, China. The process was guided by a review of WLO's central mission, a discussion of the participants' visions for what the WLO *aspires* to become in realizing its mission, and identification of key actions that need to be taken for *realizing* that vision in the next three to five years**.**

Dec 2015 **Board of Directors Adopts Strategic Plan 2015-2020 in by voice vote in Atlanta.**

WLO STRATEGIC PLAN: 2015-2020

MISSION: To promote leisure as a means to enhance the human condition

Identity: The World Leisure Organization is the world's leading advocate for leisure as a means to enhance the human condition.

Values: WLO supports the right of all people to positive, quality leisure experiences while recognizing that many have special requirements related to disability, gender, age, social status, poverty, domicile or level of education.

Activities: Through the research and educational outreach of its global membership, WLO promotes leisure as integral to social, cultural, economic, and sustainable environmental development

Scope: In carrying out its mission, WLO is committed to working with all sectors of society – the public, non- government organizations, and commercial enterprises -- to advance leisure as a human right in order to enhance the quality of life for all persons world-wide.

VISION

Our vision is to provide leadership in advancing leisure as a central force in enhancing the human condition through advocacy, research, and education that promotes socio-cultural development, encourages sustainable economic growth, and improves the quality of life for every person world-wide.

KEY ISSUES TO BE ADDRESSED IN REAFFIRMING OUR VISION

Technology

Expand the use of social media (e.g., Facebook, Twitter, email, eNewsletter, website) in communicating with members, partners, and targeted audiences about services and global events (e.g., including congresses, conferences and summits, WLO Games, and WLO Festivals).

Membership

Expand membership (e.g., to include practicing professionals, academicians and researchers, policy makers and officials, community lay leaders, students and other interested individuals representing a broad international audience) by offering differentiated membership options (e.g., student/retiree/life/institutional memberships) and expansion of benefits (e.g., free journal, reduced fees for global events, mentoring, consultation).

Branding

Focus advocacy activities on creating and disseminating policy statements, model legislative acts, educational materials, and consultative services that promote WLO's mission and that establish WLO as the leading advocate for leisure as a means to enhance the human condition by engaging in collaborative research, promoting its Centers of Excellence, and partnering with key inter-governmental bodies, affiliated professional organizations, and leisure associations around the globe.

LONG-TERM OBJECTIVES

Governance

- Organizational decision-making is characterized as strategic, inclusive, open, participatory, and Transparent.
- All commissions are active contributors to planning and goal attainment.
- Chief Operations Officer is in place, roles and responsibilities have been defined, and permanent Headquarters have been established.

Marketing

- Specific target audiences have been identified.
- *Event Marketing and Communication Plan* (2010) has been reviewed and updated.
- Advocacy activities bring greater attention, visibility and interest to the importance of leisure and its value in improving the human condition.

Membership

- Membership sustained at 2,000 members by 2020 that includes practicing professionals, academicians and researchers, policy makers and officials, community lay leaders, students and other interested individuals representing a broad international audience.

Partnerships

- Formal relations established with two affiliated professional organizations and three additional organizations identified for partnerships.
- Key intergovernmental bodies have been identified, shared goals and values clarified, and at least two partnerships in outreach and knowledge have been established.

Products

- Broad range of informational products and services are available to targeted audiences.
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Profitability

- Revenue exceed expenses by 10% annually.
- System in place that routinely monitors financial affairs of the organization.

Technology

- Use of social media (e.g., Facebook, Twitter) has been expanded and proven to be effective in communicating with members, partners, and targeted audiences.

STRATEGIC PRIORITIES

Governance

- Hire Chief Operations Officer and establish Executive Offices.
- Provide central role for commissions in the organization.
- Review governance structure for efficiency, transparency, and responsiveness.
- Promote close collaboration between the Academy and the Board of Directors.
- Develop strategies for succession in leadership roles on the Board of Directors, Commissions, Chapters, and the Academy.
- Explore expansion of role for young people in WLO governance.
- Strengthen support for and engagement with the Future Leaders program.
- Outline major action programs in order of importance to reach strategic goals and specify the resources, objectives, time-scales, deadlines, budgets and performance targets for each action program.

Marketing

- Identify specific target audiences.
- Improve public relations, create informational products and services, and develop quarterly newsletter.
- Develop marketing plan for global events aimed at enhancing the branding of WLO, including congresses, conferences and summits, WLO Games and WLO Festivals.
- Focus advocacy activities on creating and disseminating policy statements, model legislative acts, and information regarding leisure benefits.
- Develop marketing plan in conjunction with partner organizations.

Membership

- Develop plan to retain and expand membership of academicians.
- Explore merits of the nature and types of different membership categories to make cost consistent with variable national economies.
- Encourage the involvement of practicing professionals, policy makers and officials, community lay leaders, students and other interested individuals, and especially affiliate agencies and organizations.

Partnerships

- Identify critical/relevant partners; seek and offer endorsements.
- Re-establish consultative status with UNESCO.
- Become a part of the global process aligned with UN Sustainable Development Goals.
- Build relationships with intergovernmental agencies, including the European Union, African Union, the Union of South American Nations, World Health Organization, and Commonwealth of Nations.
- Establish formal relations with affiliated professional organizations, including Leisure Studies Association, National Recreation and Park Association, American Public Health Association, National Intramural-Recreational Sports Association, Indian Leisure and Recreation Organization, World Tourism Organization, International Association for Society and Natural Resources, International Coalition for Aging and Physical Activity.
- Establish partnerships with leisure associations around the globe (e.g. ANZALS (Australia/New Zealand), ANPEL (Brazil), LARASA (South Africa), LSA (UK), Otium (Spain), etc).
- Identify key intergovernmental bodies, clarify shared goals and values, and develop a partnership in outreach and knowledge.

Products and Services

- Develop a broad range of informational products and services targeted to specific audiences.
- Enhance educational opportunities through the Word Leisure Centers of Excellence, offering regional camps, packaged programs, and online courses.
- Arrange program specifically for young people at every WLO event.
- Support the *Young People's Book on Leisure*
- Expand opportunities for engagement with students from the World Leisure Centers of Excellence.
- Craft a focus on UN/UNESCO priorities to include Africa, gender equality and sustainable development goals.
- Promote *World Leisure Journal* as the leading publication communicating research, theory and critical thought in all areas that address leisure.
- Promote WLO through "Encores: the world leisure magazine."
- Pilot cultural life-long learning programs for older adults under the motto "New Craftsmanship Meets Design" via streaming and online courses.
- Identify key markets and target global events to local and hosting communities.
- Identify key global issues for analysis and potential policy development (e.g., immigration, health care, global climate change, women's rights).
- Create informational products and services that can be shared or purchased.
- Expand the network of educational programs and encourage WLO Centers of Excellence on all continents.
- Create and disseminate policy statements, model legislative acts and information regarding leisure benefits to bring greater attention, visibility and interest to the importance of leisure and its value in improving the human condition.

Profitability

- Develop procedures to closely monitor expenses.
- Identify new sources of income (e.g., foundations, speakers' bureau, and client fees)
- Develop strategies to enable long-term sustainability of fiscal resources.
- Secure long-range contracts for Games, Expo, and Congress.

Technology

- Expand use of social media to advocate for leisure through aggressive enhancement to WLO's social media portals.
- Develop e-newsletter for ready distribution to members.

Appendix

Board Organization Committee

Andrew Williams ~ Chair
Jack Agrios

Peter Chen
Luminita Georgescu
Aurelia Kogler
Ye Min
John Tower

Educational Services Committee

Yvonne Klerks ~ Chair
Luminita Georgescu
Cristina Ortega Nuere
Shikuku Willy Ooko
Atara Sivan
Jane Zhou

Governance/Constitution Committee

Karen Barak ~ Chair
Galit Nimrod
John Tower
Maliga Naidoo

Leaders/Young Professionals Committee

Joanne Schroeder ~ Chair
Miklos Banhidi
Abubakarr Jalloh
Maliga Naidoo
Chiung-Tzu Lucetta Tsai

Strategic Planning Committee (2015-2020)

Richard Hayes ~ Chair
Mike Dow
Geoffrey Godbey
Karla Henderson
Aurelia Kogler
Ricardo Uvinha