

OLLI 2030 STRATEGIC PLAN



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Executive Summary

The 2030 Strategic Plan was created to be a tool for OLLI at SOU leadership. The plan establishes four primary goals that encompass the strategic priorities of the current and anticipated future OLLI at SOU environment –Structure, Curriculum, Connection, and Sustainability. These are intentionally broad goals designed to keep OLLI leadership focused on the top organizational priorities as the educational, social, cultural, and technological environment as well as membership demographics change in the coming five years.

The Ad Hoc Strategic Planning Committee hopes that each year OLLI leadership will establish projects and initiatives to strengthen and move the organization forward within the framework of these four strategic goals. This is not a prescriptive plan that lays out specific tasks to be assigned to specific committees or staff for execution.

There is no priority in the listing of the goals; each should be considered equally. For each of the four goals, there are suggested strategies to help leadership focus on primary areas within each goal to be addressed over the five-year period. With each strategy is: 1) a list of possible opportunities for implementing a strategy; and 2) recommendations for measurements to monitor progress. These strategies are not intended to be the only action plans over the next five years. OLLI leadership should continually keep sight of the evolving strengths, weaknesses, opportunities, and threats to the organization and take action accordingly.

One Council might assign strategies and recommendations to standing committees. Another Council might choose three strategies as a priority for the year and create ad hoc groups across the standing committees to achieve them or perhaps plan for new partnerships that may require more leaders and resources.

Our world is changing rapidly, and five years is a long time. By focusing on OLLI at SOU's mission, vision, and values and these four strategic goals, OLLI leadership can use the tools of this plan to move forward in a variety of ways.

The Ad Hoc Strategic Planning Committee adopted the existing mission, values and goals of OLLI at SOU as viable for the future. The four strategic goals of OLLI 2030 – Structure, Curriculum, Connection, and Sustainability – are linked to this view of OLLI as shown in the following chart.

OLLI 2030 Summary Chart

OLLI at SOU Strategic Plan 2030

Vision

OLLI at SOU members will find intellectual stimulation, enjoyment, and invigorating learning opportunities in an accessible, comfortable, supportive, and congenial environment.

Mission

OLLI at SOU is a member-driven educational community primarily serving adults ages 50 and better. We offer a diverse repertoire of courses and programs designed to foster lifelong learning, encourage social interaction, and provide cultural enrichment.

Values

Learning

Curriculum

Activities

Excellence

Guiding Principles

We recognize the vital relationships among social interaction, creative expression, and healthy aging.

We honor the breadth and depth of our curriculum taught by volunteer instructors, and we promote programs that inspire members to participate in OLLI and the broader community.

We value activities that inspire our members to volunteer their time, talent, skills, and resources.

We measure our success by members' satisfaction with our curriculum, affordability, social opportunities, staff, and leadership.

Goals

Structure

To maintain a top-notch organization of volunteers, staff, partners, and locations.

Curriculum

To create and maintain high-quality learning opportunities led by engaged and well-versed instructors that inform, educate, and entertain members.

Connection

To facilitate connections among OLLI at SOU members and within our communities to promote learning, cultural enrichment, and social interactions.

Sustainability

To assure a stable balance of finances and membership growth to sustain OLLI at SOU for the next five years and beyond.

The Strategic Planning Process

The strategic planning effort commenced in the Fall of 2024 when OLLI President Laura Simonds asked Past President Phyllis Fernlund and current Vice President John Schuyler to co-chair an ad hoc committee to create a new strategic plan.

The following OLLI members were recruited to serve on the ad hoc committee.

- Co-Chair Phyllis Fernlund, 2022-23 OLLI Council President
- Co-Chair John Schuyler, 2024-25 OLLI Council Vice President
- Paul Christy, 2024-25 OLLI Council Treasurer
- Heather Inghram, OLLI Administrative Director
- Tracy Palermi, 2023-24 OLLI Council President
- Cathy Prazenica, OLLI Member and member of Finance and Membership Committees
- Laura Simonds, 2024-25 OLLI Council President
- Tom Woosnam, OLLI Member and Instructor
- Elisabeth Zinser, OLLI Council Director 2019-2022

The committee's first meeting was on November 7, 2024. Past Council Director and Chair of the Venue & Technology Committee, Lorraine Vail, presented an overview of the strategic planning process that was used in the past. Since Lorraine was part of the task force that developed the 2025 Strategic Plan, she shared unique insights into that plan and the overall process.

The committee then met, typically twice a month, from November 2024 to May 2025, working through the following information-gathering and plan development steps.

- Review Mission, Vision, and Values
- Review strategic plans of other OLLIs and other local organizations
- Review existing information
 - 2025 OLLI at SOU Strategic Plan
 - 2023 & 2024 OLLI at SOU annual member surveys
 - OLLI at SOU financial information
 - OLLI at SOU membership data and trends
 - OLLI at SOU course data and trends
 - OLLI National Resource Center Leadership Report
- Analyze OLLI Strengths, Weaknesses, Opportunities and Threats (SWOT)
- Interview various stakeholder groups to supplement the SWOT analysis
 - OLLI at SOU Staff
 - Past OLLI leaders
 - SOU President and Provost

- SOU Vice President of University Advancement and Executive Director, SOU Foundation
 - Rogue Valley Manor Director of Community Engagement and Executive Director
 - OLLI Committee Chairs & Liaisons and Council Directors
- Survey 2023-24 members who did not renew in 2024-25
- Develop strategic plan goals
- Hold an OLLI membership Town Hall Meeting to present the planning process and draft goals and solicit member feedback
- Develop strategies, possible opportunities, and recommendations for each goal
- Draft the plan
- Present draft plan to Council
- Revise plan based on Council input and further committee consideration
- Present final plan to Council for adoption

OLLI at SOU in 2025 & Expectations for the Next Five Years

OLLI at SOU's last strategic plan, *OLLI 2025*, served the organization well as judged by many achievements called for in that plan. On the other hand, OLLI's opportunities were curtailed by the COVID pandemic. The OLLI 2030 plan carries forward some of the OLLI 2025 aims and comes to grips with profound and rapid changes in the forecast for the coming five years. The Committee began its work by identifying OLLI's strengths, weaknesses, opportunities, and anticipated threats. In addition to the committee's own analysis, the committee also conducted interviews with OLLI leaders and key constituencies. The learning gained through these activities has informed the following perspectives and formation to goals and strategies for the coming five years.

What are OLLI's strengths?

OLLI members are enthusiastic about their experiences and appreciate the range of courses and quality of instruction. Instructors are supported by *Teaching at OLLI*, technology services, and Curriculum Committee liaisons to gain expertise and confidence. Staff expertise, dedicated volunteers, and upgraded facilities and technologies support contemporary teaching, learning, and socializing in person and online. Enrichment opportunities are expanding, such as the travel program. OLLI is integrated well with SOU and has solid financial planning and oversight. It has demonstrated capacity to adapt quickly to the unexpected. OLLI is realizing new partnerships, illustrated by its relationship with the Rogue Valley Manor. It enjoys recognition in the region and within the national OLLI network. It has a track record of self-assessment and renewal. SOU has embraced OLLI and that provides many benefits to the organization. There is much to celebrate.

What are OLLI's greatest challenges going forward?

The pace of change and scope of uncertainty are more daunting than ever for institutions and society. The evolution of technology ushers in opportunities along with threats if unchecked by thoughtful policy and restraint. Adapting to environmental and sociological threats will require vigilance, foresight, and preparation if we are to avoid fueling anxiety and withdrawal. Competition for volunteers and fund-raising among non-profits is on the rise within OLLI's demographic.

Internal Challenges

Challenges from within include internal resistance to growth and an inflexible fee structure, both important to OLLI's sustainability. OLLI's resilience is threatened by a decline of volunteers for committees and leadership roles. The course proposal process facilitates high-quality courses but may discourage potential instructors. Demand for courses in certain subject areas, demand for more online classes, and the paucity of social opportunities are likely to contribute to attrition and add downward pressure on member recruitment.

OLLI at SOU Interface

As much as we find the risk management practices of SOU an impediment, we are grateful for the protection and guidance of ongoing OLLI policy revisions with university requirements. Changes in the university's financial systems and personnel have made it difficult to track and report revenue and expenses and monitor OLLI's financial position.

Limitations

OLLI's aspirations for membership development and diversity, and for courses and activities, are under-realized due to inadequate personnel and operational resources. Spaces for movement and art classes are limited, and parking at the Higher Education Center in Medford is inadequate for a substantial swath of OLLI's demographic.

Should OLLI grow and, if so, in what areas and demographics?

Cultivating New Venues and Partnerships

OLLI has the capacity and opportunity to grow, becoming stronger and adding value to the Rogue Valley by doing so. There is untapped potential for growth, especially beyond Ashland/Talent, requiring investments in cultivating new relationships and venues. Expanding OLLI's footprint more fully in Phoenix and northwest Medford will address unmet needs and demands for learning and teaching opportunities, along with providing a larger base for volunteer instructors, leadership, and resource development. Forging relationships in these communities with interested leaders to advise and assist OLLI will facilitate success in growing membership and participation.

Demographics

Attracting and engaging recent retirees and empty nesters in OLLI will add more 'young' seniors, essential for OLLI's growth and sustainability. OLLI's capacity to engage them will require flexibility with membership and course scheduling to enable early retirees to navigate OLLI

participation along with travel and other retirement plans. Stronger recruitment of volunteers from this demographic is essential for OLLI to continue to be a member-driven organization.

How should OLLI's portfolio of courses change?

Subjects showing greater demand than supply are history, literature, STEM fields, studio art classes, and outdoor activities. There needs to be a greater balance of online and in-person courses and programs.

What opportunities will enable OLLI to thrive for the foreseeable future?

Senior Living Facility

Among the most exciting opportunities is the promise of a new senior residential living facility created by SOU (in partnership with a private entity and forecasted for three years hence). OLLI is an integral advisor in the planning for this development to be located adjacent to OLLI's home campus at the Campbell Center. It has opened new ideas for alternative forms of OLLI membership for this center's residents and potentially for those of other senior living communities.

Young Retirees

Young retirees coming into OLLI's 'pipeline' prompt ideas for new initiatives and forms of membership that may be beneficial beyond this demographic. These members will have much to offer to courses and services, including tech-savvy assistance to those seniors who need support developing their tech capabilities. They will be sources of sustainability in leadership for OLLI over time. They may spur enough growth to enable expansion in staff and opportunities to add weekend and evening courses.

Additional Venues

As OLLI attempts to expand enrollments beyond Ashland, there will be opportunities to pursue additional venues. Notable is the renewed Holly Theatre as a potential new venue for OLLI activities. It has a history of value to senior residents in underrepresented communities that could enhance OLLI's reach to become more multicultural and regionally significant.

Community Partnerships

Developing partnerships with other regional organizations would yield growth opportunities, e.g., Oregon Shakespeare Festival, Rogue Community College, the Britt Festival, Chambers of Commerce, Rotary, area realtors, and newcomer groups. Continued relationship-building with

senior living facilities can further fill unmet potential for students, teachers, social activities, and support. Other organizations, e.g., the Ashland YMCA, have shown interest in working with OLLI to expand social and outdoor events.

Osher NRC Resources

Apart from regional opportunities, OLLI should and can expand its access to the Osher National Resource Center resources and other OLLIs for mutual services in teaching and learning. Doing so can enrich the capacity to meet online course demands and widen the range of teachers, subjects, and perspectives. It would be wise to select other OLLIs with complementary capabilities, subjects, and demographics.

Financial Stability

OLLI at SOU has potential for resource enhancements with a more flexible fee structure and acquisition of sponsorships, bequests, and endowments to support growth and to optimize staff capacity, program innovations, member access, technologies, and social events. Growth in membership will increase fee revenue, maintaining financial stability.

OLLI 2030 Strategic Plan

Definitions

Goals outline the direction this plan sets forth to sustain and advance OLLI for the foreseeable future. They are broad aims to guide decisions for actions and resource allocations over the coming five years. No one goal is more important than another.

Strategies express intended actions for making progress toward the achievement of each goal.

Each strategy includes **Possible Opportunities** for actions that may enable success. These are not prescriptive actions but ideas for OLLI Council and leadership to consider as it determines optimal ways to achieve the desired outcomes.

Recommendations are measurable outcomes that track progress in each of the strategy areas. Monitoring these metrics annually can help to inform mid-course corrections as needed.

Goals & Strategies

GOAL: Structure

To maintain a top-notch organization of volunteers, staff, partners, and locations.

Strategies

1. Determine and implement the best balance of volunteers and staff to efficiently operate.

Recommendations:

- Facilitate a net increase in the number of general (non-instructor) volunteers by 20 each year for a total of 100 additional volunteers by 2030.
- Establish and implement a best-practice ratio of staff-to-volunteers by the end of 2026-27.

2. Establish succession planning for the immediate Past President on the Executive Committee and for standing committee chairs.

Recommendations:

- Add the immediate Past President to the Executive Committee for the year following their presidency starting in 2025-26.
- Implement a succession plan, with term limits, for standing committee chairs.

3. Utilize established resources to identify and implement best practices.

Resources may include the Osher National Resource Center, other OLLIs, SOU, regional nonprofit organizations, membership associations, and volunteer groups.

Recommendations:

- Create a compendium of at least three important resources to be available to Council Directors and committee chairs by the end of 2025-26.
- Review and revise this compendium as needed for governance and programming decision making.

4. Establish and promote SOU, RCC, and community partnerships for facilities, marketing and media, and sponsorships.

Possible opportunities include partnering to establish: new OLLI at SOU venues for courses and programs; new outlets for promoting OLLI at SOU programming and membership recruitment; new sponsors that have an affinity link to the OLLI at SOU demographic.

Recommendations:

- Add three venues for classes and programs/activities with SOU and/or other organizations where both OLLI and the partner organization derive benefits.
- Maintain a role with SOU in the proposed senior living community throughout planning, development, construction, programming, and launch phases.
- Add three new outlets for marketing that benefit both parties.
- Develop and maintain a consistent base of four sponsors annually.

GOAL: Curriculum

To create and maintain high-quality learning opportunities led by engaged and well-versed instructors that inform, educate, and entertain members.

Strategies

1. Increase online course offerings to provide a more balanced distribution between online and in-person courses.

Possible opportunities include: targeting online instructor recruitment; providing training and professional development to enhance the comfort level with online instruction; developing and training a pool of Zoom co-hosts so that a co-host can be assigned to every online course; incorporating courses from the national Osher Online offerings; collaborating with other OLLIs that provide online courses.

Recommendation:

- Achieve a balance of in-person and online course offerings that align with responses from member surveys.

2. Monitor member interest and participation in course subject areas and take intentional action to provide a well-rounded mix of courses each year that mirror member interests.

Possible opportunities include: recruiting new or existing instructors to teach in areas of specific interest to members; consider alternatives to the registration and waitlist processes.

Recommendation:

- Use data of oversubscribed courses (20+ on waitlist) to drive the next term's curriculum. Compare data annually.

3. Establish new course venues beyond Ashland and recruit instructors to teach in those geographic areas.

Possible opportunities include: collaborating with the new Britt Educational Center to offer OLLI courses in Jacksonville; recruiting instructors in northwest Medford and offering courses in their locations

Recommendation:

- Establish two to four new regular course locations, with onsite support and classroom technology, in areas of the Rogue Valley beyond Ashland.

4. Pilot a project(s) to offer courses outside of the current Monday–Friday, 9 a.m.–5 p.m. schedule to evaluate current and prospective member interest.

Possible opportunities include: using data from the Member survey and Non-renewing Member survey to select courses for pilot projects on weekends and evenings.

Recommendation:

- Offer three evening and three weekend courses per academic year, using registration and attendee data to drive future offerings.

5. Work with SOU to create intergenerational course experiences for OLLI members.

Possible opportunities include: collaboration with the Honors College, student affinity groups, undergraduate senior projects, and Educational Psychology students.

Recommendation:

- Offer one course per term with an intergenerational component.

GOAL: Connection

To facilitate connections among OLLI at SOU members and within communities to promote learning, cultural enrichment, and social interactions.

Strategies

1. Facilitate more member-driven Shared Interest Groups.

Possible opportunities include: seeking groups that provide a variety of ways for members to connect via: topics of interest; various hands-on or physical activities; types of outings such as dining, wine-tasting, theater, music, art; discussion groups; and replicating existing groups in new geographic areas.

Recommendation:

- Grow the number of SIGs (Shared Interest Groups) to 10.

2. Host regular and diverse programs, activities, and events for OLLI at SOU members both online and in-person at various geographic locations and a variety of times, including weekdays, evening, and weekends.

Possible opportunities include: one-time and series programs; local, regional, and international travel; “brown bag” lunches; theme of the month programs; coffee, walking, hiking, art/craft, or discussion meet-ups; volunteer groups; singles-only events.

Recommendations:

- Offer two one-time programs each term.
- Offer one to two social events per term, rotating the geographic area and time of day to serve varying ages and interests.

3. Host occasional one-time or series programs or events open to both OLLI members and the public to promote OLLI at SOU in the Rogue Valley and its opportunities for lifelong learning, social interaction, and cultural enrichment.

Possible opportunities include: community lectures on a variety of topics; prominent speakers; art, music, or a Taste of OLLI class followed by a social hour.

Recommendation:

- Offer one to three public programs per year, ideally ahead of the beginning of a term.

4. Utilize a variety of resources to develop interesting and culturally enriching content tailored to OLLI at SOU members.

Possible opportunities include: using the annual member survey feedback and working with: the Osher National Resource Center; other OLLIs; SOU instructors, outdoor adventure leadership, and science, theater, and art departments; area businesses and entertainment venues.

Recommendations:

- Double the number of relationships with other organizations each year.
- Establish a relationship with a new SOU department or the senior living facility.

GOAL: Sustainability

To assure a stable balance of finances and membership growth to sustain OLLI at SOU for the next five years and beyond.

Strategies

1. Grow membership.

Possible opportunities include: establishing program locations beyond Ashland and focusing member recruitment in those areas; establishing multiple entry levels of membership for those who want to try OLLI before fully investing or those who cannot participate for 3 full terms; adapting programming to meet the changing needs and interests of both aging members and prospective members under 70.

Recommendations:

- Increase membership to 2,200.
- Reduce annual membership attrition and conduct periodic surveys of non-renewing members.
- Lower the median age of members as measured by the NRC benchmarking survey.

2. Diversify revenue sources.

Possible opportunities include: creating new membership fee options that provide various benefit levels such as basic membership with per course enrollment fees, flat fee rolling-year membership with full benefits and auto renewal, and life-time memberships; expanding the travel program; considering new sources of sponsorship revenue; boosting Annual Fund donations; developing and implementing a bequest and Legacy Fund strategy; monetizing OLLI programming.

Recommendations:

- Grow the travel program by 5% annually.
- Grow sponsorship revenue by 3-5% annually.
- Grow charitable giving, via the Annual Fund and distributions from the Legacy Fund, to a total of \$100,000 by 2030.

3. Evaluate and modify the uses of OLLI funds.

Possible opportunities include: increasing staff to maintain and enhance operational support; developing OLLI at SOU staff capability to understand and manage financial reporting; evaluating advertising costs and sources to optimize results; reviewing finances and format options for printed catalogs.

Recommendation:

- Grow revenue and reallocate funds to allow for an additional full-time staff position.

Conclusion

The Ad Hoc Strategic Planning Committee and OLLI Council are pleased to present this strategic plan to guide OLLI at SOU forward from 2025 to 2030.

The OLLI Council charged the Ad Hoc Strategic Planning Committee to examine OLLI, consider its future, and prepare a document that frames the governance of and pathways for a thriving OLLI at SOU over the next five years. OLLI leadership - the Council, standing and ad hoc committees, and staff – are intended as the primary users of this plan. However, the plan also provides transparency for OLLI membership and SOU so that all parties can understand the underlying rationale and intentions for decisions going forward.

The Ad Hoc Strategic Planning Committee was comprised of leaders with varied experiences and interests. Each member shared unique perspectives as active participants in the OLLI community. Additional information and ideas were obtained by consulting with OLLI members, standing committee chairs, University leaders, and a sample of partners. In addition, a survey of recent non-renewing members to learn reasons for not renewing helped to inform the Goals and Strategies. A membership Town Hall was held to give all OLLI members an opportunity to learn about the process and offer input helpful to the committee in completing its work for presentation to the OLLI Council for review and approval.

OLLI at SOU's Mission, Vision, and Values were reviewed and affirmed as strong and still relevant for the near future.

Throughout its work, the committee kept the following question at the forefront: "What should OLLI at SOU be like in 2030?" This question guided conversations and creation of the plan.

This plan was created to provide a general road map to guide OLLI at SOU governance and operations. The heart of this document is the four Goals. Strategies to achieve each goal represent the committee's best judgment on pathways for growth or improvement in each area. Possible Opportunities offer ideas on recommended actions pertinent to a strategy. They are not intended to be prescriptive but to suggest actions for each strategy while honoring the roles and responsibilities of future leaders to make specific decisions. Finally, for all of the strategies, the plan proposes Recommendations that could be used to measure and monitor progress and make mid-course corrections as needed.

OLLI as a Community: "Come for the Classes, Stay for the Connections"

One of the striking results of our work was the realization that there is strong support for OLLI as a community. OLLI has classes, programs, travel opportunities, shared interest groups,

community forums, social gatherings and so much more. Beyond paying membership fees for classes, we see OLLI as a community that could be embraced by members whether or not they are taking classes. OLLI is a gem in the Rogue Valley, bringing learning, connections, and new friendships to seniors throughout the region.

Implementation of *OLLI 2030* will depend upon the OLLI at SOU Council's use of the plan in guiding its annual initiatives and policy decisions. We are optimistic that the future of OLLI at SOU is bright.

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The Ad Hoc Committee utilized a number of resources in the development of this plan. Those resources include:

- 2025 OLLI at SOU Strategic Plan
- 2023 & 2024 OLLI at SOU Annual Member Surveys
- OLLI at SOU financial information
- OLLI at SOU membership data and trends
- OLLI at SOU course data and trends
- Osher National Resource Center Leadership Report FY24
- Survey of Non-Renewing Members (2025)

Contact the OLLI at SOU office at olli@sou.edu for copies of these resources.