



OLLI@UGA Long-Range Strategic Plan

July 1, 2020 – June 30, 2023

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Introduction

Why does OLLI@UGA need a long -range strategic plan? The Cheshire cat in Lewis Carroll's *Alice in Wonderland* said, "If you don't know where you are going, any road will get you there." In January 2020, OLLI revived its Long-Range Strategic Planning Committee (LRSP) to help chart a successful road to travel for the next three years. However, at this writing in June 2020, the world has changed dramatically due to the COVID-19 virus. The uncertainties of this pandemic, and the fact that our members are in a high-risk category and UGA has closed its campus, make it impossible to predict OLLI's road to the future at this time.

The Long-Range Strategic Planning Committee members are Susan Dougherty (chair), Larry Dendy, Barbara Lewis, John Songster, and Madeline VanDyck. OLLI President Chris Jones and President-Elect Cher Snyder were resources and observers and Tim Meehan, executive director, participated as an ad-hoc committee member.

Our initial mission was to guide OLLI@UGA in planning its future by developing a three-year plan to be approved by the Board of Directors (BOD) in fiscal year 2020-2021. The committee agreed to: develop a three-year Long-Range Plan, review the plan annually and make recommendations to the board. Given the extraordinary current circumstances, we realized the need to proceed in stages. For each of the proposed goals, the plan outlines actions for the board's consideration which could be implemented over the next six months, as well as actions that realistically cannot be fully addressed until the pandemic is under control.

When the committee completed its research in February and March 2020, OLLI@UGA's membership count seemed stable and continued growth was anticipated. However, the pandemic has made many aspects of OLLI's future uncertain. Because most OLLI members are in a high-risk category for the virus, the BOD decided to mainly offer ZOOM classes in the fall semester of 2020. Since more than 1,000 current members need to renew their membership by July 1, 2020, there is no way to predict membership totals and revenue for the coming fiscal year.

The work of previous Long-Range planning committees has helped OLLI achieve notable growth in membership, classes, SIGS, and other programs. However, a review of previous plans reveals that many issues cited in those plans still face the organization. The current committee, which began work at the start of 2020, set out to identify those systemic issues by looking at OLLI's strengths, examining areas that can be improved and identifying opportunities to provide better services for members. As part of our research we also asked about potential threats. Little did we know that the greatest threat to our members and our organization was looming in the COVID-19 pandemic.

In addition to studying market data and reviewing historical documents, committee members interviewed more than 30 OLLI leaders including officers, BOD members, volunteers, and staff members. An analysis of the data we gathered identified seven areas of focus that OLLI@UGA

should address. But then the COVID-19 pandemic arrived, UGA made the decision to close the campus and a national stay-at-home order was issued. Commendably, the BOD and staff moved quickly to transition classes to the ZOOM format but ultimately only about 60 of the 130 classes left in the semester were presented via ZOOM. Those lost classes, as well as cancelled luncheons and travel study trips, created a significant loss of revenue, in addition, of course to the loss of in-person social interactions.

A small group of Board members and volunteers worked rapidly in May to create a slate of classes for summer 2020. If these classes are well attended, they could provide much-needed revenue. The Curriculum Committee is working to provide appealing and interesting classes for the fall 2020 semester, mostly via ZOOM.

The following report summarizes the results of our research and data collection. We also offer a number of recommendations. Some, the committee believes, can be accomplished in the next six months. Others will take longer to achieve and we leave it to the BOD and executive director to prioritize them and set time lines. The LRSP Committee will remain intact and will periodically review progress on this plan, perhaps offering recommendations as conditions and circumstances warrant over the next three years.

OLLI@UGA's Vision

(Not yet created)

Mission of OLLI@UGA

[OLLI@UGA is dedicated to meeting the intellectual, social, and cultural needs of adults 50+ through lifelong learning.](#)

Strategic Areas of Focus

Based on research conducted by the LRSP Committee in January and February 2020, the following seven areas of focus were identified:

1. Future Financial Stability
2. Impact of the COVID-19 Virus on OLLI@UGA's Growth
3. Sound Governance
4. Effective Management and Systems Development
5. Diversity and Community Outreach
6. Membership Enhancement
7. Volunteerism

Strategic Goals

1. Future Financial Stability

Given our current circumstances and limited revenue, it is imperative that the president appoint a robust and active Fund Development Committee. The BOD should charge the committee with raising funds to help sustain OLLI@UGA. The BOD should give the committee clear and concise goals to meet by the end of the year. The executive director and staff should actively support, and help meet, in a timely manner goals set by the committee.

The committee should be charged with creating three Fund Development Campaigns. Two of the plans should be completed by December 31, 2020. The third would be a comprehensive plan for Learning in Retirement to raise \$----- by June 30, 2023.

The Annual Fund Campaign should be one of the campaigns and the UGA Development Office should be asked to actively participate in that campaign. The BOD should set a goal based on an increase of ----- % over last year's Annual Fund drive.

The second fundraising campaign should be a small-dollar donation drive that can be completed by December 31, 2020. It would be expected to raise \$---Unfortunately, a "\$25 for 25 years" campaign planned for spring of 2020 was not carried out because of the pandemic, erasing an opportunity for OLLI members to engage in a meaningful fund-raising effort. The committee might consider using the Covid-19 crisis as an incentive for a new campaign.

The third piece for the committee and staff to develop is an endowment plan for OLLI@UGA. This would be a comprehensive capital campaign to raise significant dollars in the range of \$500,000. This campaign could progress for the next three to five years with the goal of creating a financial cushion of one year's operating expenses, currently approximately \$500,000. The long-term goal would be to create an endowment that provides an additional stable flow of money for OLLI's future.

2. Impact of Covid-19 Virus on OLLI@UGA's Growth

This area of growth also involves numerous activities, many of which can partially or even fully be completed within the next six months. Over the past three years, OLLI@UGA has grown significantly. In 2017, when the last Long-Range Plan was written, the membership was under 1,400; today membership is more than 1,650. Given the normal growth rate of our target population and the growing national reputation of Athens as a top retirement destination, there seemed no need for an aggressive growth plan. However, because of the pandemic, there may be a dramatic drop in membership. In July 2020, the BOD will have data on how many members have continued their memberships. That data will help determine goals for the Membership Committee and plans for recruiting more members.

Capacity pre-pandemic: Existing capacity for classroom and parking space at River’s Crossing appears to be adequate for now, especially if a more targeted curriculum and optimized scheduling are developed. In 2019, the BOD approved an additional full-time staff member. There was not private office space for this person at the time and the executive director, working with the COE dean to obtain more space had to put the project on hold with the arrival of Covid-19.

Capacity post-pandemic: Since the majority of classes for the fall 2020 semester are online, the BOD needs to take immediate and assertive steps to work with the College of Education to have parking and support fees at River’s Crossing eliminated prior to the beginning of the semester. As long as staff is working from their homes, office space is not an issue. However, the Executive Committee and Executive Director should work with the COE dean to plan for adequate space when people return to campus.

3. Sound Governance

Even with the organization’s continuous growth, OLLI’s leaders have been able to provide members with interesting classes and social opportunities. The BOD has maintained the current governance structure to the best of its ability. To ensure that the BOD continues to function at full capacity over the next three years, we recommend the BOD and executive director explore the following areas and implement needed improvements as resources permit. We leave it to the BOD and executive director to determine priorities and set time frames for addressing these areas. Accomplishing these goals will be a function of the BOD priorities; the timeline should not be affected by the pandemic.

A. Vision

Create an overarching OLLI vision statement that can guide future policy development and inspire members to be a part of the organization.

B. By-Laws and Procedures

By-laws and procedures are a critical road map for any non-profit organization. They need to be clear, concise and provide an operational structure for the BOD and staff. The current by-laws and governance structure do not support continuity in the organization. With the president serving only one term and half of the BOD changing every two to four years, it is difficult to set goals and implement them in a timely fashion. The LRSP Committee recommends the following:

- Conduct an in-depth review of by-laws and policies with an eye to developing clearer, more detailed procedures and responsibilities.
- Change the structure of the BOD to provide more continuity. This has been suggested in every Long-Range Plan proposed. Having the president serve only one year makes it difficult to create clear goals and follow through on implementation.

- Specify desired qualifications and skills for members of the BOD.
- Develop a nomination process that clearly states the steps and procedures for nominations to the BOD.
- Formalize effective training for the BOD and require attendance on an annual basis.
- Develop concise job descriptions for the BOD roles, the executive director, and committee chairs that include annual specific, measurable, attainable, reachable, time-bound, (SMART) goals.
- Develop guidelines for each committee including annual goals.
- Require that reports to and from the BOD be focused on achievement of the goals.
- Develop guidelines or norms for interaction between OLLI members and staff, and between OLLI members to ensure everyone is treated with respect and appreciation.
- Conduct a financial audit at least every two years.

C. Enrollment and Classes

- Review the rationale for having two different membership enrollment periods, with a look toward simplification and possible reduction to one membership enrollment period.
- Review the length of each semester and number of classes offered.

D. Document Repository

Create an easily accessible repository for key documents for use by leaders and members.

4. Effective Management and Systems Development

Given the current situation, implementing system efficiencies will be more important than ever. Of the proposed activities, several can be started immediately. Others, particularly those that involve outside agencies, will have to wait until we achieve a more normal working environment.

OLLI@UGA has more full-time and part-time staff than other OLLI's of our size who hold the 501(c) 3 status. We don't know how many volunteers other OLLIs have working in their offices. OLLI@UGA has none. The newest person hired by OLLI@UGA in 2019, the Member Services Coordinator, brings the total of full-time staff to four and there are also at least two part-time employees.

It is important for staff to continue to create a welcoming atmosphere at River's Crossing and wherever classes and events are held, and OLLI members and some volunteers note that the staff is patient and polite. However, the staff's dedication to responding to members has

become a double-edged sword. Staff sometimes finds it difficult to concentrate on the work at hand while at the same time interacting with members who are in and out of their offices asking questions, seeking information or who just want to visit. In interviews conducted prior to the pandemic and campus closing, staff members reported a sense of disorder caused by interruptions from members along with frequent telephone calls. They are also frustrated with the lack of space and privacy. Currently the staff works from home and meetings and classes take place via ZOOM. Due to the pandemic, some form of remote workspace will likely continue to be necessary for the next six months. But going forward, changes should be implemented to provide more private working conditions for staff.

Based on the interview results, there appears to be confusion on the BOD's and the executive director's part regarding their roles. Some committee volunteers observe that the executive director comes to committee and BOD meetings unprepared. The same is true of a few BOD members.

The executive director does not always take notes or follow up on committee work between meetings. This results in long lag times in pursuing committee work and creates unnecessary follow-up for volunteers trying to accomplish committee goals. We recommend creation of a report template for the executive director to use when interfacing with the BOD and committees. The template would include goals and deadlines as well as clear statements about what has been accomplished. Having these structured reports would create clear communication. The report structure should be developed collaboratively and the executive director should consult the BOD and committee chairs to discover what would be helpful to both parties. This communication goal should be in place by the beginning of fall 2020 semester.

It is the responsibility of the executive director to make sure all internal systems work efficiently and effectively. As some volunteers and staff report frequent breakdowns in communication and the lack of completion of goals in a timely manner, we recommend that a management audit be conducted as soon as possible during the fiscal year 2020-2021. The purpose of a management audit is to evaluate the performance of managerial functions. A management audit might be difficult to conduct immediately due to the pandemic. However, the BOD should investigate who might conduct the audit and create plans for an audit when the situation allows in 2021. In the meantime, we recommend that the staff conduct a self-audit with a focus on continuous improvement for all of the systems. This effort should be transparent with monthly reports presented by the executive director to the BOD regarding areas of systems improvement. The systems that need improvement or implementation are listed below.

There is dissatisfaction among members and staff with communications between the OLLI office and members. People dislike having two systems—the OLLI@UGA website and Mighty Networks. They would like to see Mighty Networks eliminated and replaced with one strong website with the following:

- A user-friendly registration process
- A simple payment and credit process
- Documents that describe the organization and member advantages
- A repository of historical documents
- An updated master calendar with classes, events, committee meeting times and Special Interest Group meetings and times
- A membership directory that allows members to communicate via email
- A website that is attractive and inspiring

The BOD should decide on a timeline for accomplishing the elimination of Mighty Networks and the creation of a strong website. Expertise is available in talented OLLI members who have taught IT and within the staff. It is important to focus on improving these systems prior to bringing members back to campus. Thus, we recommend this be accomplished in the next six months.

A major problem area for both members and staff is the lack of an efficient telephone system. A system that includes messages and call back options would eliminate many of the interruptions that staff currently experience and decrease frustrations of OLLI members trying to reach the office. It is our understanding that the current telephone system is a UGA system with many features. It is set for calls to roll from one desk to another in hopes that someone will answer the phone. This gives callers no options to leave messages and receive a timely return call. We recommend a system be installed that gives initial instructions on which button to push for which staff member. If that person is not available, the caller can leave a detailed message and expect a call back. This would give staff time to check messages and get back to the caller in a reasonable time frame.

As noted above, office space limitations are an ongoing difficulty for staff. The executive director and Executive Committee should work to acquire additional office space that could be arranged so that one staff member interfaces with members who need assistance and other staff can work in private.

5. Diversity and Community Outreach

Members who responded to a survey see a great opportunity for OLLI@UGA to partner with other organizations both on and off campus in order to increase our image in the community and to achieve more diversity in membership and class offerings. Some efforts have been made on this front with the initiation of ZOOM classes being offered at other places and River's Crossing.

A new committee needs to be formed in order to recruit a diverse membership. The BOD, executive director, the Marketing and Communications Committee and the Membership Committee should all be represented on the new committee. The mission of the committee

would be to develop a plan for community outreach with a focus on inclusiveness and diverse population. The president should appoint a BOD member as a liaison to the committee to set clear and concise goals.

Organizations that could be candidates for potential collaboration include the Classic Center, the Council on Aging, and Piedmont Athens Regional Hospital. These efforts could provide opportunities for greater member diversity as well as additional space for classes. While preliminary plans can be developed, unless they are via the web, outreach will necessarily be delayed until the pandemic is under control.

6. Membership Enhancement

With the exception of the current ongoing work of the Membership and Hospitality committees, much of the additional proposed work in this area will need to wait until the pandemic has subsided. We encourage continued creative solutions to the problems we face regarding staying in touch with members.

The OLLI@UGA members are the reason the organization exists. Participation in OLLI is a major reason some people move to Athens. Our mission statement clearly states that, "[OLLI@UGA is dedicated to meeting the intellectual, social, and cultural needs of adults 50+ through lifelong learning.](#)" Our committee found that members are pleased with the organization and find it affordable and interesting. The Special Interest Groups are highly acclaimed and enjoyed by members.

However, while the breadth of classes keeps people interested, some find the number of classes overwhelming and would prefer fewer, more intense classes. Members would also like to see more opportunities to socialize. Currently, most social activities are structured and held in formal settings such as restaurants. Members would like the opportunity to socialize in less structured settings, both after classes and at other times. While actively pursuing new members did not seem necessary prior to the pandemic, it is in OLLI@UGA's best interest to recruit, inform, develop and engage our members more actively. Unfortunately, the primary option currently available during the pandemic is ZOOM meetings and classes. The Membership Committee has stayed connected with members during this time through phone calls and other personal contacts. We encourage the Membership and Hospitality committees to work together to create new ways to make being a member of OLLI easy and fun.

7. Volunteerism

Member volunteers provide a critical infrastructure for OLLI@UGA. The volunteer Board of Directors provides leadership and policy oversight to the organization. Volunteer committees play a crucial role in the operations of the organization by:

- Recruiting instructors and classes
- Providing travel experiences for our members
- Reviewing and proposing bylaws and policies
- Overseeing the financial well-being of the organization
- Raising new dollars for the organization
- Hosting social events
- Welcoming and orienting new members
- Communicating with our members and marketing to our community
- Organizing Special Interest Groups
- Nominating members to participate on the BOD
- Facilitating the development of a Long-Range strategic plan.

Particularly in an organization like OLLI's, the large number of volunteers needed to accomplish all of the above requires continuously recruiting, training and engaging members who have not volunteered in the past. Some committee leaders say they have experienced frustration in their interactions with the executive director and staff members. Staff response time is often slow or even non-responsive. If this continues, it may contribute to fewer members being willing to stay in leadership roles.

There is a void regarding formal recognition and thanks to volunteers. Volunteers should be thanked on a regular basis as they give of their time, and staff members should be thanked as well. Currently there is no formal mechanism to ensure this happens. We recommend that the president create a Volunteer Support and Appreciation Committee. The mission of the committee would be to train volunteers for their various roles, establish volunteer appreciation strategies, and recommend commendations for outstanding service. While planning can and should start within the next six months, implementation of activities in this area will need to wait until the cessation of the pandemic.

Recommended Actions for Next Six Months

- President appoint a robust and active Fund Development Committee. Two of three plans they are tasked with creating should be completed by December 31, 2020.
- BOD to take immediate and assertive steps to work with the College of Education to have parking and support fees at River's Crossing eliminated.
- Report templates for Executive Director to use with BOD jointly agreed upon and in use.
- Management audit be conducted as soon as possible during the fiscal year 2020-2021.
- New website be in place in the next six months.
- New committee needs to be formed in order to recruit a diverse membership. The president should appoint a BOD member as a liaison to the committee which will set clear and concise goals for this effort.
- New Volunteer Support and Appreciation Committee to be established.

Conclusion

The Long-Range Strategic Planning Committee is hopeful that this report provides a roadmap for the next three years and especially for the next six months. We know from many years of research that when an organization stays focused on continuous improvement in a strategic - manner, that great things can become a reality. As members of OLLI@UGA, the committee is committed to assisting the organization in its pursuit of excellence.

Thank you to all the OLLI@UGA members and staff who participated in the process to create this plan.