OLLI@UGA LONG-RANGE PLAN

Targeted dates: Fall, 2013 through spring, 2016

Updated, December 2014

MISSION STATEMENT

The Osher Lifelong Learning Institute at The University of Georgia is dedicated to meeting the intellectual, social, and cultural needs of mature adults through lifelong learning. OLLI@UGA aims to keep our minds sharp, our bodies active, and our lives enriched by friendship. Our overarching goal is to offer OLLI@UGA members, at a reasonable cost, a set of courses, luncheon programs, interest groups, travel opportunities, special events, and social events that will bring enjoyment and enhance mental and physical health.

LONG-RANGE PLANNING

The purpose of the long-range plan is to guide Learning in Retirement, Inc. d.b.a. OLLI@UGA in envisioning its future and recommending the necessary programs and operations to achieve that future. The Long-Range Planning Committee engages in a continuous process of strategic and operations planning in consultation with the Board of Directors, OLLI@UGA committees, and membership. It sets long-range goals and objectives for the organization, assists the Board and committees with implementation of the long-range plan, checks on progress periodically, and provides feedback to the Board of Directors.

The following is a brief history of the current, 3-year long-range plan that was approved by the Board of Directors at its July 7, 2013 meeting:

- Interviews with and written commentary from 2012-13 committee chairs, members of the Board of Directors (BOD), other OLLI@UGA members, staff of OLLI@UGA, and administrators in the College of Education at UGA.
- Mission statement, four goals, seventeen objectives, and suggested strategies were approved by Board of Directors, July 7, 2013.
- An assessment of progress on the long-range plan was presented orally and in writing to the BOD in January, 2013.
- Additions, deletions, and modifications resulted throughout 2013 and 2014 from BOD, Executive and LRP Committees, the standing committees, ad hoc committees, and staff; documentation compiled through committee reports, minutes, and interviews.
- Modified LRP proposed herein to be brought before the Board of Directors, December, 2014.
MIDTERM UPDATE

This is the mid-point period of the 3-year plan that was approved by the BOD in July 2013. The following is an update and revision of this long-range plan. The following has been prepared primarily for two reasons (a) to modify and update the plan as suggested by various stakeholders, and (b) to highlight where additional work may be warranted.

This report is primarily focused on 2015 through spring of 2016 and is meant to supplement (not repeat) the assessment that was provided to the Board in January of 2014.

It is important to note that the 4 goals and 17 objectives approved by the Board in July 2013 have NOT been modified in the report below; rather, it is the narrative beneath each that is the crux of this report. However, 13 objectives have added that are either currently in progress or should happen in the near future. Further, a myriad of strategies have been suggested to accomplish the 4 goals and 30 objectives delineated in this report.

GOAL I: Implement an effective and efficient governance structure that enhances OLLI@UGA’s sustainability and future direction.

Objective A. Improve principles and process for selection of board of directors and officers.

Suggested strategies:

1. Review best practices for nonprofit BOD governance and 501(c)(3)’s and use the literature as a basis to recommend [any] modifications in the current process. Such review might include, but not be limited to:
   a. General statement of principles or guidelines for effective BOD governance;
   b. Current BOD practices;
   c. Expected responsibilities and ethics to guide the BOD and officers;
   d. Number of directors and officers;
   e. Length of terms of office;
   f. Election of the officers by the Board OR by the membership; and
   g. Other practices that might contribute to the accomplishment of Objective A. (Nominating Committee review literature, analyze, discuss, and make recommendations to the BOD by January of each year).

2. Review skills, talents, and experience of incumbent BOD and other OLLI@UGA members to seek full slate of directors and officers to fill needs in accordance with Bylaws - Nominating Committee as selected at November BOD meeting, prepare slate of candidates, and conduct annual election according to Bylaws.

Objective B. Educate and train Board of Directors in the fundamentals of effective governance and leadership.

Suggested Strategies:
1. Orient all newly-elected Board of Directors – *President, completed prior to first board meeting.*

2. Review with the BOD organizational goals for the coming year; OLLI@UGA’s governance structure, administrative and other responsibilities, and expectations; and code of conduct and conflict of interest policies (see Goal I, new Objective I) for an effective and efficient BOD – *President and Executive Committee at the July Board of Directors first meeting.*

3. Review with the BOD strengths, weaknesses, opportunities, and threats for the current year and the years ahead – *President, Executive Committee, Executive Director, and Chair of the Long-Range Planning Committee at the July Board of Directors meeting.*

4. Conduct additional BOD education and training sessions as determined through annual planning and needs assessments – *President and Executive Director, July and January of each year.*

**Objective C. Operate an effective and efficient organization.**

Suggested Strategies:

1. Discuss annual organizational goals and a prioritized program of work with the Executive Director on an annual basis – *Executive Committee, to be completed in July of each year.*

2. Orient all newly-appointed standing committee chairs – *President and Executive Director, completed prior to first standing committee meetings of each year.*

3. Review with the standing committees organizational goals for the coming year; OLLI@UGA’s governance structure; administrative and other responsibilities; policies and procedures; committee responsibilities; planning a program of work and budget implications; monthly reports; and code of conduct and conflict of interest policies – *President, Executive Committee, and Executive Director; completed prior to first standing committee meetings of each year.*

4. Continue the reporting process that keeps the Board of Directors, Executive Director, standing committee chairs, and membership informed of the achievement of the goals, objectives, and related activities as well as issues and challenges – *President, Executive Committee, and Executive Director through on-line monthly reports provided by committee chairs.*

5. Review the Policy and Procedure Manual annually and amend as needed – *President, Executive Committee, and Executive Director, updates by June of each year.*

6. Review operational needs of committees, volunteers, and staff and adjust as needed – *Executive Director, Executive Committee, and Board of Directors, ongoing.*

7. Evaluate annually the performance of the Executive Director as per the approved job description developed by the College of Education and accomplishment of annual goals and program of work – *President and Executive Committee, to be completed in January of each year and submitted to the Associate Dean for Outreach and Engagement in the College of Education.*

**Objective D. Foster relationships with groups and individuals integral to the success of OLLI@UGA.**
Suggested Strategies:

1. Continue to expand outreach with The University of Georgia, the College of Education, the Bernard Osher Foundation, UGARA, and the Athens community - Executive Director, Executive Committee, Board of Directors, and standing committees, ongoing.
2. Support the continuation and expansion of sponsorships and make adjustments as needed – Executive Committee, Executive Director, and Marketing Committee, ongoing.
3. Encourage collaboration and outreach to other lifelong learning organizations – President and Executive Director, ongoing.
4. Develop a public relations plan that identifies needs, goals, and activities to have maximum impact on enhancing relationships with these groups – President, Executive Committee, Executive Director, and Communications Committee by March, 2015.

Objective E. Review annually the governance structure and outcomes of the long-range plan with a focus on improved effectiveness, efficiency, and results.

Suggested Strategies:

1. Consult with the Board of Directors and standing committee chairs (e.g., through interviews, survey, meeting) to determine where we are and where we need to be – annually by Long-Range Planning Committee with a report to the Executive Committee and BOD by January of each year.
2. Revise and update LRP annually – Long-range Planning Committee with report to the BOD by January of each year.

Objective F. Establish an ad hoc Communications Committee to coordinate all aspects of internal and external communications with OLLI@UGA

NOTE: This objective was added to the long-range plan in December of 2014. The sources for this added objective include discussions by the BOD in February, 2014; written materials provided to the BOD on 6-14-14; BOD minutes, 7-14-2014; report from the working committee on communications, 8-28-14; ExCom minutes, 9-13-14; and draft of BOD minutes, 11-10-14.

Suggested Strategies:

1. The purpose of the ad hoc Communications Committee is to provide timely, useful, consistent, and cost effective communication with OLLI@UGA membership and the greater Athens community – Enhanced communications are to be completed with ad hoc committee and managed by staff.
2. Congruent with Goal I, Objective D, the Committee will develop a public relations plan that identifies needs, goals, and activities to have maximum impact on enhancing relationships integral to success of OLLI@UGA – President, Executive Committee, Executive Director, and Communications Committee by March, 2015.
3. The Committee will coordinate the OLLI@UGA print materials including the course catalog, *The OLLI Times* newsletter, membership brochures, fund-raising and marketing materials, BOD materials, and other print publications to assure consistency in branding, accuracy, timeliness, attractive appearance, and conformity with professional journalistic standards.

4. The Committee will oversee the website to assure its consistency, accuracy, attractive appearance, utility, and conformity with OLLI@UGA information and uphold professional and journalistic standards.

5. The Committee will develop procedures and guidelines to ensure that all publications, including the website, contain material appropriate for dissemination to the membership and the wider community and are respectful of privacy issues.

6. The Committee will provide technical and editorial support upon request to officers, staff, and committee chairs in preparation of web-based and print materials, including any publications intended for dissemination beyond membership.

7. The Committee will provide technical support upon request to officers, staff, and committee chairs in the use of blogs, pages on the website, and social media relative to OLLI@UGA.

8. Create a job description for this committee’s chair - *Executive Director, completed November 2014.*

9. Determine and request the professional, technical, and financial requirements to support this effort – *Executive Committee, Executive Director, in budget development, 2015-16.*

**Objective G. Support an ad hoc Leadership Committee to prepare OLLI@UGA to recruit welcome, orient, train, and support prospective and new leaders.**

**NOTE:** This objective was added to the long-range plan in December of 2014. The sources for this added objective include BOD minutes, 9-13-14 and BOD training held 9-13-14.

Suggested strategies:

1. Appoint an ad hoc committee to establish a purpose and create a plan for leadership development – *Executive Committee and Executive Director, February, 2015.*

2. Determine and request the administrative requirements to support this effort - *in budget development, 2015-16.*

**Objective H. Review job expectations, workload, descriptions, assignments, funding, and staffing patterns related to employment with OLLI@UGA/LIR, Inc. and make adjustments accordingly.**

**NOTE:** This objective was added to the long-range plan in December of 2014. It is based on interviews and documentation of many factors such as the membership growth of the organization and related services, expectations of an executive director, new technological systems, the newly-approved organizational structure, increased workload, leadership requirements, management and coordination factors, etc. This need to evaluate overall staffing of OLLI@UGA was discussed and a motion approving such a review passed unanimously at the 11-10-14 BOD meeting.
Suggested strategies:

1. Consider an expanded or revised job description to more adequately reflect the vision of OLLI@UGA, leadership, financial management, expectations, and expanded workload of the Executive Director – Executive Committee, Treasurer, and two additional BOD members who are also committee chairs, in consultation with the Executive Director and the Associate Dean for Outreach and Engagement in the College of Education, by February 2015.

2. Related, examine staffing needs which might include additional staffing - Executive Committee, Treasurer, and two additional BOD members who are also committee chairs, in consultation with the Executive Director and the Associate Dean for Outreach and Engagement in the College of Education February 2015.

Objective I. Develop two new policies to underpin the work of OLLI@UGA and its Board of Directors.

NOTE: This objective was added to the long-range plan in December of 2014. The sources for this added objective include interviews with the Executive Committee, staff, BOD, and chairs of standing committees.

Suggested strategies:

1. Review literature researching best practices of conduct, ethics, and conflict of interest expected of officers and board members for volunteer organizations and any related IRS guidelines impacting 501(c)3 organizations and prepare brief report for review by BOD – Two members of the BOD in consultation with Executive Director, to be completed by March, 2015.
   a. Develop a code of ethics policy - Two members of the BOD in consultation with Executive Director, to be completed and approved by BOD by April, 2015.
   b. Develop a conflict of interest policy - Two members of the BOD in consultation with Executive Director and Treasurer, to be completed and approved by April, 2015.

2. Include information in orientation of newly-elected BOD members and standing committee chairs (see Goal I, Objective C).

GOAL II: Enhance the financial sustainability of OLLI@UGA

Objective A. Establish financial policies and procedures that support the core mission of OLLI@UGA and that enhance its sustainability and future direction.

As suggested strategies and with leadership from the Finance Committee:

   a. Continue to establish as part of the annual budget targeted goals for revenue streams that consider membership dues, course fees, travel fees, endowment amounts, support from
corporate and other sponsors, member and other contributions, fund development, and other sources to enable an annual balanced budget.

b. Establish as part of the annual budget expenditures in compliance with policies to include wages and benefits, indirect costs, contracting services, registration/data management services, operating expenses, committee requests, reserves, fund raising and marketing, membership services, technology, and other expenses as needed.

c. Conduct a line item review of the annual budget - to be completed by Finance Committee and approved by April BOD meeting each year.

2. Establish ready reserves to support OLLI@UGA’s projected growth and unforeseen/emergency needs and suggest a measure of adequacy of reserve funds – Finance Committee by March 2015.

3. Develop amendment for Management of Funds section of LIR, Inc. Financial Policies requiring cash reserves for BOD approval - Finance Committee by March 2015.

4. Continue to provide quarterly financial reports for revenue and expenses – Finance Committee to the BOD and Executive Director by October, January, April, and July of each year.

5. Review and amend as necessary MOA guidelines for use of Osher Lifelong Learning Institute’s Endowment Agreement annual distribution and any other forthcoming endowment funds (e.g., leave-a-legacy) - TBD

Objective B. Develop policies and protocol for establishing satellite campuses and sponsored classes beyond the UGA and Athens communities.

(Objective has been completed.)

Objective C. Continue to broaden and strengthen fund-development efforts.

As suggested strategies and with leadership from the Fund Development Committee:

1. Through balanced and thoughtful campaigning, continue to develop an ethic of individual member financial support as a feature of OLLI@UGA membership.

2. The Fund Development Committee will present to the BOD and Finance Committee, prior to the annual budget review, the goals and strategies for fund development for the coming fiscal year, including those for:
   a. Annual fund campaign
   b. Special events
   c. Leave a Legacy
   d. Memorial gifts
   e. Other

3. The Fund Development Committee will review, evaluate, and potentially add special fund-raising events annually and increase participation by members.

4. The Fund Development Committee will develop and review guidelines for effective donation management on an annual basis with OLLI@UGA staff and other interested parties.

5. The Fund Development Committee will establish guidelines for donor selection of giving opportunities and the outcomes of each for the OLLI@UGA membership. These guidelines will be made available for the BOD, OLLI@UGA staff, and OLLI@UGA membership.
6. Develop appropriate administrative, marketing, and financial support for fund development programs – *in budget development each year.*

**Objective D. Continue to grow and strengthen the marketing development efforts.**

As suggested strategies and with leadership from the Marketing Development Committee:

1. Develop appropriate support for the Marketing Development Committee within the OLLI@UGA Board of Directors, OLLI@UGA staff, and membership.
2. Present to the BOD and Finance Committee, prior to the annual budget review, the marketing goals, anticipated revenue, and expenditures related to
   a. Sponsorships
   b. OLLI@UGA Gear – including website and catalog
   c. Special events
   d. Other
3. Provide to the BOD an annual marketing plan at the beginning of each fiscal year.
4. In collaboration with the ad hoc Communications Committee, develop a strategy to present a marketing campaign within the greater community to include:
   a. Advertising
   b. Press Releases
   c. Publicity
   d. Events
   e. Other
5. Develop guidelines for working with other OLLI@UGA committees and support entities that will enhance marketing efforts.
6. Review the guidelines for sponsorship recruitment, support, and recognition and modify as necessary – *President, president-elect, and chairs of Fund Development and Marketing Development Committees by June of 2015.*

**Objective E. Grow and develop OLLI@UGA as a service organization and in the spirit of the Osher Foundation such that a second Osher Endowment, if offered and applied for, is warranted.*

*(Objective has been completed.)*

**Objective F. Conduct an audit of accounting policies, procedures, and expenditures of OLLI@UGA.*

**NOTE:** This objective was added to the long-range plan in December of 2014.

Suggested Strategies:

1. Consult with financial advisor to determine most appropriate accounting examination of organization record - report to the Executive Committee and BOD with recommendation by regular meeting in January 2015.
2. Plan as required including amount to include in FY 2015-16 budget for audit procedure
   Feb/Mar 2015
   a. Search out auditing businesses to select a firm to conduct audit
   b. Select auditing firm and determine audit schedule and necessary preparation
   c. Ensure internal records and procedures will be available
3. Contract with auditing firm, May/June 2015
5. Monitor audit 1Qtr FY 2015-16
6. Report audit results 2Qtr FY 2015-16
7. Perform remedial actions called out in audit report – Complete by June 30, 2016

Objective G. Estimate financial resource needs and expenditures for two successive future budget periods.

NOTE: This objective was added to the long-range plan in December of 2014.

1. The projected requirements are to be based on long-range projections; SWOT analysis (strengths, weaknesses, opportunities, and threats); annual budgets; historical data; independently-researched information; and interviews with key stakeholders; to be completed by Finance Committee with an initial report at January, 2015 BOD meeting.
2. Update annually and present at yearly BOD planning retreat in July of each year.
3. Develop software based forecasting template for use by FY 2015-16.

GOAL III: Research and implement an integrated data collection, data management, and registration system meeting all data needs of OLLI@UGA.

Objective A. Determine the needs of all OLLI groups that would benefit from such a data system.

(Objective has been completed.)

Objective B. Research available data software systems that meet the needs and are acceptable to OLLI@UGA.

(Objective has been completed.)

Objective C. Contract for the new system to meet the needs of the various stakeholders of OLLI@UGA.

(Objective has been completed.)

NOTE: GOAL III, Objectives D, E, F, G, H, and I that follow were developed by the IT Committee chair, OLLI@UGA Vice President, and Executive Director.
Objective D. Implement Avectra Association Management Software – Phase I (Basic Functionality)

Suggested Strategies:

1. Implement basic functionality for core modules:
   a. Member management
   b. Course registration
   c. Event registration
   d. Special Interest Group registration
   e. Sell merchandise
   f. Solicit funds
   g. Manage finances - Executive Director, System Administrator, IT Committee, Treasurer, and standing committee chairs by 1-31-2015.

2. Conduct post-implementation critique and follow-up - Executive Director and System Administrator by 1-31-15 – 6-30-2015


Objective E. Implement additional Non-A vectra technology (e.g. Google Drive, etc.) to enhance staff and volunteer productivity.

Suggested Strategies:

1. Continue moving toward a “paperless” organization.
2. Develop and implement a document management policy and strategy.
   a. Determine records retention requirements and policies
   b. Determine what needs physical storage and what may be digitally stored.
   c. Determine and budget storage and security methods.
   d. Set control and access policy – BOD, Executive Director, IT Committee, and System Administrator by 12-31-15.

Objective F. Transition the Information Technology Committee from an operations (hands-on) focus to a strategy and operations review focus.

Suggested Strategies:

1. Determine the ideal IT Committee size and recruit members (minimum 5)/

2. Periodically examine OLLI@UGA’s software systems, website, member data management, and other technology-related concerns or needs and develop improvement recommendations.
3. Determine, budget, and request the resources (e.g. staff, volunteers, software, etc.) to support the projected efficient application of technology - IT Committee Chair and members, Executive Director, and Executive Committee, in budget development.

**Objective G. Implement Avectra Association Management Software – Phase II (Enhanced Functionality)**

Suggested Strategies:

1. Implement advanced functionality for core modules:
   a. Targeted member management
   b. Enhanced course registration management
   c. Expanded event hosting
   d. Targeted data mining and analysis
   e. Targeted marketing
   f. Expand social media as is effective for the organization
   g. Further integrate financial management
   h. Other as is determined - Executive Director, System Administrator, and Board of Directors, 07-01-2015 – 06-30-2016.

**Objective H. Increase member computer literacy, especially in use of OLLI@UGA member resources.**

Suggested Strategies:

1. Develop a pro-active core curriculum component, presented regularly, to increase member computer literacy and engagement and in particular use of OLLI@UGA web and media resources through the use of the “Khan Academy” approach and resources (video/online lectures followed by in-class lab sessions).

2. Manage and reinforce member expectations from OLLI@UGA resources.

3. Develop methodologies to keep presentations up to date with evolving technologies - IT Committee, Curriculum Committee, and on-line training providers; course offerings to begin Spring 2016, and ongoing.

**Goal IV: Grow the membership in OLLI@UGA by continuing to strengthen its committees, programs, and services as well as its volunteer opportunities.**

**Objective A. Determine the sustainable membership level and the maximum level of activity participation.**

Suggested Strategies:

1. Increase the membership of OLLI@UGA to 1750 by June 30, 2016.
2. Recruit a Membership Committee to coordinate membership goal setting, recruitment, retention, surveys, membership research, and membership satisfaction – *chair of Membership Committee and Executive Director by January, 2015*.

3. Develop and implement a plan to reach and maintain the sustainable membership level by January of each year – *Chair of Membership Committee and Executive Director*.

4. Study the Athens area membership potential with the assistance of a demographer and present the findings to the BOD and the Long–Range Planning Committee - *Membership Committee by June 2015*.

5. Evaluate factors which may pose limitations on membership growth and plan the necessary steps to reduce their effects - *Executive Committee, Board of Directors, Executive Director and Membership chair by January, 2015*.

6. Coordinate with other committees as appropriate to provide timely feedback as to the needs and wants of new, returning, and prospective members.

7. Develop appropriate relationships with potential community groups of interest both to canvas for members and to increase the visibility of OLLI@UGA (Membership Committee, Executive Director, and BOD, ongoing).

8. Determine membership information helpful to manage and operate OLLI@UGA and survey new and renewing members each year through the AveCtra system – *engage a professional survey designer if necessary: Executive Director, Membership Chair, and Systems administrator, complete annually, and share resulting data with BOD*.

9. Improve member retention rate by using and analyzing data compiled over the last three years for more effective outreach - *Executive Director and Membership Committee chair, by November of each year*.

10. Review quarterly where the membership numbers stand against goals and budget - *Executive Director, Finance Committee chair, Membership chair, and BOD*.

11. Develop in conjunction with the AveCtra installation the data retrieval system necessary for thorough evaluation of membership-based information - *Executive Director, System Administrator, and Membership Committee chair and in collaboration with other committee chairs by June 30, 2015*.

12. Determine and request administrative and budgeting needs to manage membership growth and servicing - *in budget development annually*.

**Objective B. Maintain viable and appealing courses and activities to attract and retain members each year.**

Suggested Strategies:

1. Curriculum Committee to examine program results and offer avenues for improvement where warranted, expand curriculum capacity to reflect membership growth, consider evening and weekend classes, consider sites other than River’s Crossing, and evaluate the registration system implemented in spring 2015 – *completed regularly by Curriculum Committee chair and Executive Director*.

2. Hospitality Committee to review, evaluate, and potentially add social events and increase participation by members, being mindful of additional costs – *completed regularly by Curriculum Committee chair and Executive Director*.

3. Travel Committee to continue to offer visible and appealing travel opportunities.
a. Consult with Curriculum Committee to offer classes complementary to travel development.
b. Include a balance of local, state, national, and international travel opportunities that appeal to members and potentially attract new members.
c. Expand mutually-beneficial relationship with Road Scholar and other tour operators as appropriate.
d. Explore collaborative trips with other lifelong learning organizations in Georgia to expand programs and travel opportunities for OLLI@UGA members.
e. Coordinate with other OLLI@UGA committees (e.g., Marketing, Communications, SIGS, OLLI Times) for promotion, needs assessment, sharing of information – completed regularly by Travel Committee chair and Executive Director.

4. Continue to establish, promote, maintain, support, and evaluate SIGS – completed regularly by SIG Committee chair and Executive Director.

5. Prepare monthly reports to Executive Director for review by BOD – all committees monthly from September through June of each year.

Objective C. Increase the number of volunteers who participate in planning, implementing, and evaluating OLLI@UGA’s programs and activities.

Suggested Strategies:

1. Using data obtained by an annual survey of members, provide a listing of members with their skills and experience who are willing to assist with this objective. Keep data of members who are willing to assist with this objective - Volunteer Coordinator, complete each term.
2. Develop a volunteer information article(s) which provides details of tasks, time, and skills needed and publish volunteer opportunities in the OLLI Times and OLLI on-line – Executive Director and Volunteer Coordinator, ongoing.
3. Actively solicit volunteers for committees, class facilitation, special activities, etc. - Volunteer Coordinator with committee chairs, complete each term
4. Provide the appropriate knowledge and guidance to volunteers - Volunteer Coordinator and committee chairs, complete each term.
5. Develop a program to incentivize and honor volunteers in meaningful ways so as to emphasize recruiting volunteers who may not have a history of participation - Executive Director, Executive Committee, and Volunteer Coordinator by 1-30-15.

Objective D. Continue to market the features and benefits of membership in OLLI@UGA and its branding as the area’s leading source to meet the lifelong learning needs of mature adults.

As suggested strategies and with leadership from the Communications and Marketing Development Committees and in collaboration with the Membership Committee:

1. Utilize a plethora of strategies to market the features and benefits of OLLI@UGA such as membership forms, advertising, public relations, in newsletters, press releases, on the website, through Facebook, presentations to groups, and personal selling.
2. Explore technology and new media to further promote membership in OLLI@UGA and its programs and services, such as Facebook, Twitter, targeted e-mail, etc.

3. Continue to offer and expand the OLLI@UGA Gear “store” with appropriate merchandise and outlets from which the merchandise can be sold, such as
   a. OLLI@UGA website with a link to OLLI store;
   b. Display at River’s Crossing;
   c. Merchandise exhibits at OLLI@UGA events;
   d. Publication of annual catalog; and
   e. Others to be determined

**Objective E.** All committees should prepare yearly goals, a related program of work, administrative requirements, and proposed budget congruent with OLLI@UGA’s annual budget development.

**NOTE:** This objective was added to the long-range plan in December of 2014. The sources for this added objective include current practice implemented by the President, July 2014.

**Suggested Strategies:**

1. The following committees work with and report to the Executive Director: Curriculum, Membership, Publications, Registration, Special Interest Groups, Travel Study, Volunteer Coordinator, Hospitality, and Information Technology.

2. The following committees work with and report directly to the Board of Directors: Finance, Nominating, Fund Development, Long-Range Planning, and Marketing Development.

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**The OLLI@UGA Long-range Plan Update Committee**

Rich Cary  
Richard Lynch, Chair  
Nancy Songster  
Jay Shinn

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