



AT THE
UNIVERSITY
OF GEORGIA®

Long Range Plan

June 2017

Adopted by the board July 2017

Background

The purpose of this plan is to provide a flexible, high level view of strategic priorities for OLLI@UGA to address over the next three years. (A brief history of this OLLI is included in Appendix 1.) The approach for the plan is to focus on a few issues for the upcoming year, with the implementation steps for each priority to be developed by specific individuals or teams with expertise.

Since 2010, there have been multiple assessments of OLLI:

- a report by Dr. Laura Bierema from the College of Education,
- an assessment by the Long Range Planning Committee in 2012
- the Fanning Institute consultation in 2015,
- a team-building consultant at the Board level
- analyses by members based on Osher data and other sources

The recommendations from these planning tools have been implemented rather inconsistently, and in some cases, not at all.

Scholarly research has shown that minimal use of a strategic plan is normal: approximately 70% of corporate strategic plans in the US fail to be implemented. To increase the likelihood that important long

range issues are addressed, plans need to focus on a few key issues and then engage stakeholders in the development of crucial actions steps.

Key Issues

Most organizations can effectively handle 2-3 change efforts in a year, while still functioning as a productive organization. For even a small number of changes to be effective, buy-in among stakeholders is essential. Therefore, the primary goal of this plan is to provide a foundation for strategic dialogue, engagement, and action.

Methodology

As a step in that process of dialogue, Diane Neuhauser, a strategic management consultant and new member of OLLI@UGA, interviewed 27 OLLI stakeholders during March, 2017. These interviewees included recent and long-term members, staff, and Denise Spangler from the COE. (The complete list is in Appendix 2.) The purpose of these discussions was to provide a foundation for strategic planning during the next two or three years. In addition, data from the Osher National Resource Center and other research was used extensively.

In the following sections of this plan, a few strategic priorities for the 2017/2018 year are identified, along with Key Actions for each priority. A lead person has agreed to be responsible for the development of specific actions steps, to be implemented by the date noted in the document. It is assumed these actions and dates will be adjusted as the context shifts and the needs of OLLI change.

I. Strengths & Weaknesses (SWOT) Analysis

Several sources of data have been used to develop the Strategic Priorities:

- Analyses of OLLI since 2010 by several consultants
- Quantitative data from the Osher National Resource Center
- Data mined during 2015-16 from the current IT system at OLLI
- Qualitative data from interviews conducted in March, 2017

Long term improvements and mission sustainability are made possible in large measure by understanding what has made the organization successful as well as the structural and operational stumbling blocks that may have held it back. In strategic planning, those characteristics are revealed through SWOT or a strength-weakness-opportunity-threat analysis.

Strengths

- Our members: talented, committed, engaged
- Our staff: dedicated to the mission, effective
- Affiliation with UGA and the College of Education
- Programming quality and variety
- Resources from Osher National Resource Center)
- Modest financial foundation

Weaknesses

- Lack of effective systems: silos, burn-out, communication
- IT usability for members
- Habits of interaction: rumors, conflict
- Long-range financial sustainability
- Loss of new members after first year

Opportunities

- Meeting the needs of two age groups: Greatest Generation and Boomers
- Athens as a retirement point
- Proactive relationships with UGA
- 501(c)(3) status: independence and fund-raising

Threats

- Capacity to meet member needs due to growth, generational differences
- Potential competition for baby-boomer market

II. 2017-18 Strategic Priorities

Effective strategic planning does not happen once every three years; rather, it is an ongoing process of discussion, action, assessing results, and adjusting. In short, it is an organic process that is flexible and collaborative. In that spirit, this plan focuses on one year, with a few priorities to accomplish, based on engagement of OLLI members in developing action steps and monitoring impact. Future priorities are noted, to be developed as soon as feasible. The responsible person noted for each Key Action is the lead in assuring timely, high quality implementation—but is not expected to act alone. Instead, a team of members and other resources should be recruited to expedite completion.

1. Solidify Financial Foundation

a. **Maintain balanced budget**

Lead person: Treasurer

Review quarterly performance with the board

b. **Develop plans to achieve financial stability**

Based on present OLLI@UGA member services model (classes, travel-study, SIGS, social functions, etc.) and organization affiliations (UGA, Osher Foundation, UGA Foundation) develop a range of plans identifying principal sources of revenue and support costs.

Lead Person: *Finance Committee Chair*

Completion date: *February 2018*

2. Align Leadership Roles and Management Functions

a. Clarify the operating role and function of Executive Director

Ensure the understanding of the functional structure (as adopted by OLLI@UGA) and the role and function of the ED within this

Lead person: *President*

Completion date: *December 2017*

b. Institutionalize a strategic focus at the Board of Directors level

Lead person: *Executive Committee/President*

Monthly beginning July 2017

c. Clarify and define the role of OLLI@UGA Operating Committees

Ensure that the committees are able to achieve the objectives and responsibilities of Board of Directors approved strategic and operating plans

Lead person: *Executive Director*

Completion date: *September 2017*

3. Develop a Teamwork Environment and Manage Conflict

a. Develop methods and practices for resolution of conflicts

Involving all members of OLLI@UGA leadership, develop processes to deal with a full range of conflicts.

Lead person: *President*

Completion Date: *March 2018*

b. Prepare OLLI@UGA leadership development guide

Compile a document designed to prepare elected officers, board members and committee heads for service to the organization.

Lead person: *Ad hoc committee appointed by Executive Committee*

Completion Date: *December 2017*

4. Assess Use and Effectiveness of Information Technology

a. **Conduct an independent assessment of the current registration system**

Measure the use of and satisfaction with the OLLI@UGA member and data management system hosted by Abila; and use the findings to identify remedies.

Lead Person: *Executive Director*

Completion Date: *October 2017*

b. **Develop design and functional improvements to the OLLI@UGA website**

- Secure the committed assistance and support of COE.
- Recommend updates and redesigns for the website.

Lead person: *Executive Director*

Completion Date: *May 2018*

III. 2018-19 Strategic Focus

While out-year attention to aspects maintaining organization success and contributing to longer term viability are not emphasized; they are important for continuity and a sense of progress toward future goals. Key strategic issues identified in Part II through review of earlier studies and recent interviews are stepping stones for broader and more comprehensive program, operations and member service improvements. Each of the three priorities for 2018-19 listed below is a natural extension of the work suggested for the prior year.

1. Improve Information Technology and Service to Benefit Members and Organization Management
2. Establish Goals and Plan for Long-term Fundraising
3. Implement a Level of Formal Orientation and Training for OLLI@UGA Leadership

IV. 2019-20 Strategic Goals

The priorities of OLLI@UGA may well change, and areas that need strategic planning will be altered by the success and completion of previous years' goals. The areas laid out below are not expected to be either exhaustive or directive but as a possible progression from the previous areas touched on in the plan.

1. Set Vision and General Course for OLLI@UGA Future Identifying Critical Success Factors
2. Evaluation and Modification of Leadership Selection and Succession
3. Outreach Support to UGA and Athens Area Entities