

# OLLI@UGA 2026-28 Long-Range Strategic Plan

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## Table of Contents

1.0 Overview	p2
2.0 Vision, Mission, & Purpose	p3
3.0 Brief History of LiR / OLLI@UGA	p3
4.0 Individual motivation for joining OLLI@UGA	p3
5.0 Key Focus Areas	p5
6.0 Objectives	p7
7.0 Strategic Initiatives	p8
8.0 Resource Allocation	p8

## **1.0 Overview of the Strategic Plan**

This Long-Range Strategic Plan covers Fiscal Years (FY)2026-28. Driven by data, this plan lays out benchmarks OLLI@UGA needs to meet in order to achieve future financial sustainability.

OLLI's mission and sustainability depend on members' engagement with an array of different programs. Therefore, the plan is member-focused, concentrating on increasing membership to a sustainable level while meeting member needs with a variety of vehicles.

The purpose of this plan is to provide strategic direction from 2026 to 2028. The plan envisions an annual review to see if targets have been met, if other opportunities are present, or if other necessary adjustments are needed. The plan is designed to support current OLLI@UGA Bylaws and Policies. The intent is for this to be a rolling three-year plan. Next year's long-range strategic planning committee will focus on the period 2027-29.

## **2.0 Introduction**

### **2.1 Vision**

OLLI@UGA envisions that its members will celebrate life through the benefits of lifelong learning and community engagement.

### **2.2 Mission**

OLLI@UGA is dedicated to engaging its members in lifelong learning through opportunities for intellectual, social, and cultural enrichment.

### **2.3 Purpose**

OLLI@UGA offers its members a varied curriculum of classes, a variety of shared interest groups, and opportunities for travel and social engagement.

## **3.0 A Brief History of Learning in Retirement / OLLI@UGA**

OLLI@UGA began in 1994 as Learning in Retirement, Inc., operating out of the University of Georgia Center for Continuing Education. In 2000, the organization moved to its current location at River's Crossing and became part of UGA's College of Education. In 2008, the Board of Directors moved to secure funding from the Osher Foundation in the form of endowments. Under its new name of OLLI@UGA, the organization achieved its first 500-member target in 2009 and had 1,000 members by 2013. Prior to the pandemic, OLLI@UGA had more than 1,600 members, and currently has 1,146.

Katy Crapo was hired as the first full-time director in 2010 and retired in 2017. Tim Meehan, the current director, succeeded her. Currently OLLI@UGA has three full-time and two part-time staff members and offers classes in Athens and in Lawrenceville, Georgia, at the UGA Gwinnett Campus.

## **4.0 Why individuals join OLLI@UGA: Three Market Segments**

### **4.1 Those retiring to Athens and the surrounding area**

A distinctive feature of the membership of OLLI@UGA is the many people who retire to the Athens area from all over the country. Some already have family here, or are UGA alumni, but frequently they might not know anyone, or just a few people when they arrive. OLLI@UGA gives them a chance to connect and network. OLLI provides a distinctive range of programs that separate it from other organizations (such as the Athens Community Council on Aging). Moreover, its members benefit from connections with the University of Georgia (i.e., privileges such as a library card and access to the UGA Ramsey Center for Recreational Activities).

#### 4.2 University Retirees

A second large segment of members is retirees from the university. Some of these members have had experience teaching with OLLI, or have colleagues who are already OLLI members. OLLI recruits at UGA Retirees Association events every year.

#### 4.3 Longer standing members of the Athens and surrounding communities

A third major group of members is people who are natives or long-time residents of Athens, or at least have spent their career in Athens and the surrounding area. These people already have more social connections in Athens and generally are more interested specifically in classes and programs rather than the networking and social aspects of our mission.

## 5.0 Key Focus Areas

This plan calls for achieving goals in three over-arching focus areas:

### 5.1 Membership Sustainability

Achieve a financial break-even membership within the three years of the plan based on the current Average Member Spend (AMS) of \$172 per year.

Average Member Spend consists of seven categories<sup>1</sup>:

Category	Amount (\$)	Percentage
Membership	66	38%
Classes	53	31%
Lunch & Learn	16	9%
Social Events	3	2%
Travel	9	5%
Donations	17	10%
Parking	8	5%

### 5.2 Class and Program Sustainability

Ensure that OLLI offers classes and other programs that meet member needs.

### 5.3 Financial Sustainability

Support OLLI's financial stability by strengthening focus in two specific areas:

- i. Securing sponsorships and increasing planned and major gifts
- ii. A measured approach to fee increases

### 5.4 Conclusion

These three goals are also self-reinforcing: more members should mean more volunteers to create programs and to reach out to more potential members. The more OLLI@UGA members get involved, the greater the chance for a long-term increase in donors.

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<sup>1</sup> For new members who join during the calendar year period, only half of their membership fee is included in that fiscal year, lowering the average membership fee.

## 6.0 Specific Long-Term Goals

6.1 Achieve a break-even membership of 1,626 within three years.

Break-even is based on the number of members needed for the current annual Average Membership Spend (AMS) of \$172 (See Appendix A).

Year	Total Membership	Percentage Change
2025	1261	10%
2026	1386	10%
2027	1510	9%
2028	1626	8%

6.2 Shrink the current budget shortfall each year by a minimum of 33% of the projected 2025 shortfall.

This can be done by:

6.2.1 Increasing the number of members

6.2.2 Increasing participation in programming

6.2.3 Increasing alternative revenue streams

See Appendix B for annual targets.

6.3 Minimize the effects of inflation through strategic incremental fee increases.

In the last few years, OLLI has faced rising expenses and higher UGA salaries and benefits that are beyond the control of the Board of Directors. The Board increased the membership fee in FY2024 from \$60 to \$70.

Incremental increases in membership fees, as opposed to larger infrequent increases, will allow us to keep fees low for longer. This should have positive results both in terms of income and membership retention. (See Appendix C for the calculations).

## 7.0 Objectives

7.1 Grow membership at a minimum of 10% a year.

The membership has grown at an average of 10% over the past few years. The following table shows what a 10% increase would look like over the next four years.

Year	Membership
2025	1,260
2026	1,386
2027	1,524
2028	1,677

7.2 Increase annual member retention from the 2024 baseline.

- First-year current member retention: 50%
- Overall current retention: 62%

The overall current retention rate is lower than the historical norm, which was closer to 75%. However, the first-year member retention rate has always been substantially lower than the overall retention rate. An increased focus on retaining members takes some of the weight off continually finding new members.

7.3 Target \$211 as a minimum AMS.

With additional programs, there are ways of increasing the AMS. See Appendix E for breakdown of how the increase can be achieved.

7.4 Increase program fees in small increments.

- Proposed increase of \$2.00 to the membership fee in even-numbered years.
- Compensate for ongoing inflation by adjusting fees for classes and programs (e.g. Lunch & Learn) as needed.

The chart in the Appendix C shows that raising membership fees by \$2.00 every other year from FY2026 would bring in a small amount of additional income each year of the planning period while avoiding a large fee increase in any one particular year.

7.5 Obtain a positive overall OLLI@UGA rating from members via the annual member survey.

OLLI takes a satisfaction survey almost every year. Going forward, survey questions should seek to gather information necessary for measuring Key Performance Indicators (KPIs).

7.6 Ensure class delivery methods meet the needs of members.

This can include offering in-person, Zoom, hybrid, and off-site classes.

7.7 Meet or exceed the 2024 total number of offerings each year for classes, social events, trips, and membership events.

This is both a financial and engagement imperative - an increase in members will result in an increase in class and program opportunities.

## **8.0 Strategic Initiatives**

8.1 Support member inclusiveness and accessibility based on geography, age, disabilities, income, race/ethnicity, sexual orientation, and interests.

8.2 Grow the OLLI@UGA experience at the UGA Gwinnett campus to achieve three specific goals prior to adding additional in-person geographic locations:

- i. Enroll 300 members (new and renewed).
- ii. Start two or three Shared Interest Groups (SIGs).
- iii. Increase committee and Board involvement.

8.3 Build plans to grow fund development through more sponsorships and planned giving contributions.

8.4 Create a training program to provide a leadership pipeline for officers, the Board of Directors and committee chairs.

8.5 Incorporate appropriate initiatives and objectives into annual committee plans through collaboration of the executive director and committee chairs.

## **9.0 Resource Allocation**

9.1 In order to ensure that the organization can continue to provide support as it increases membership, create one additional Full Time Equivalent (FTE) staff position, or equivalent part-time position, for each additional 400 members to provide administrative support.

(See Appendix G for calculations on additional staffing).

9.2 Calculate costs for each additional new member exceeding the 2025 budget (currently around \$10 per member).

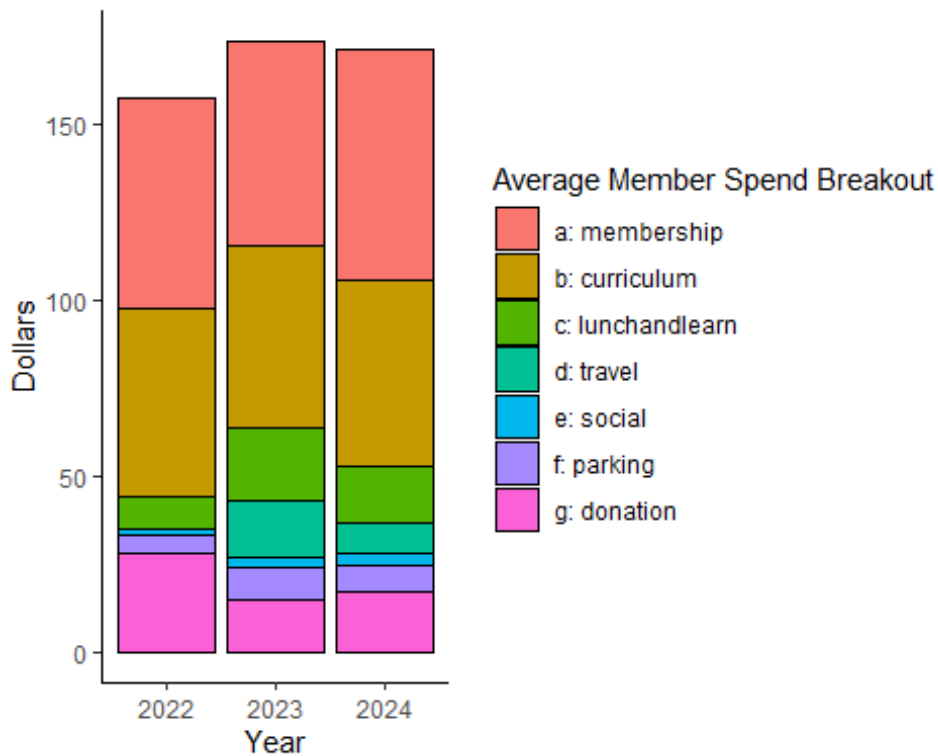
Although exceeding the FY2025 membership target would be a positive, it is important to remember there will be residual costs that will impact budgeting. Such costs include providing the *OLLI Times*, enlarging Class Lists, and inclusion on the Mailchimp database.



## Appendices

### Appendix A: Average Member Spend (AMS) - Long-Term Goal 1

The AMS for OLLI@UGA for this year (as of March 2024) is \$172. This is fractionally below last year's AMS. The largest changes between FY2023 and FY2024 are due to an increase in donations and a substantial decrease in travel.



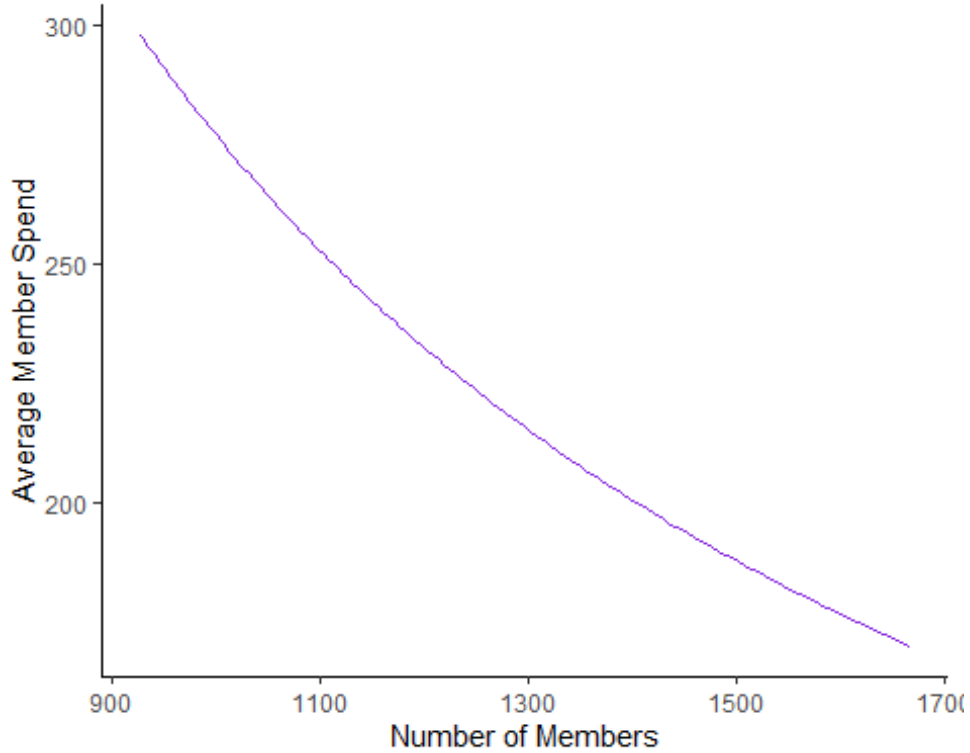
### Appendix B: Predicted Shortfalls based on current FY2025 budget - Long-Term Goal 2

Year	Shortfall / Surplus (\$)
2025	-8,820
2026	-5,880
2027	-2,940
2028	0

The FY2025 budget is also predicated on growing membership by 10%.

In order to break even for 2025 while keeping the AMS constant at \$172, the number of members necessary would be 1,626. This would be an increase of 44.8% over current membership.

The chart below shows the balance of members against the AMS to meet the budget.

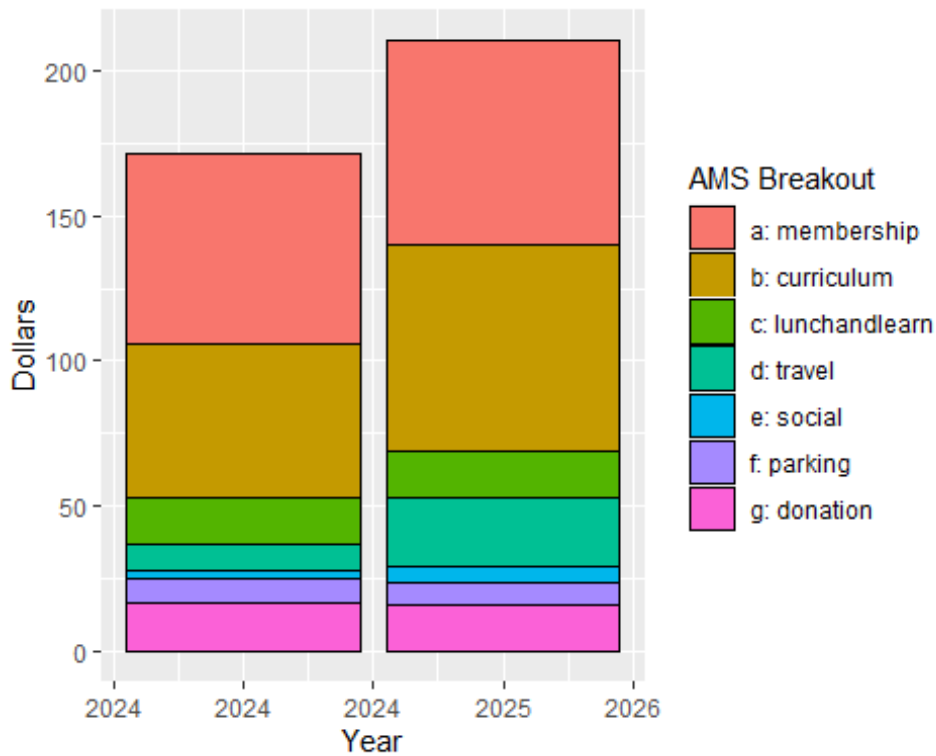


Appendix C: Increase in Fees - Objective 4

Year	Members	Adjustment	income with adjustment - \$	income w/o adjustment - \$	Differential - \$
2024	1,146	70	80,220	80,220	0
2025	1,261	70	88,242	88,242	0
2026	1,387	72	99,839	97,066	2,773
2027	1,525	72	109,823	106,773	3,051
2028	1,678	74	124,162	117,450	6,711

## Appendix D: Average Member Spend FY2025 - Objective 4

Currently the budget for 2025 assumes an increase in the AMS to \$211



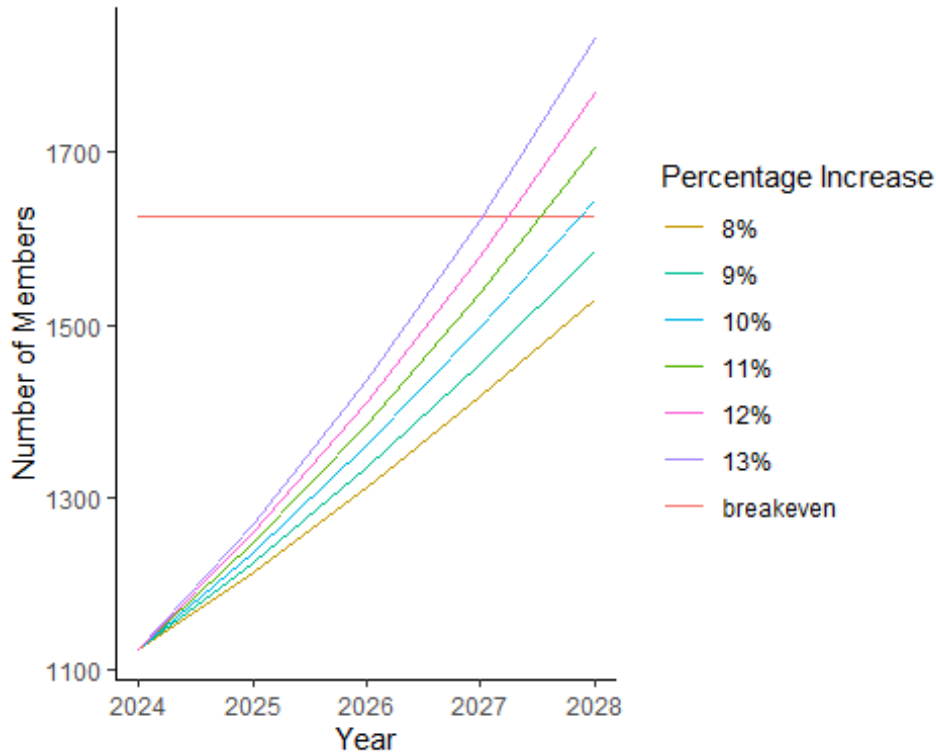
The difference in the AMS is \$39. Although this a non-incremental shift, this is within reach for next year.

1. Average membership should increase from 66.1 to 68.8 (\$2.7).
2. Travel revenue would be higher through additional trips (approximately \$19 of income per member through travel).
3. Plans for a new social event (\$1.43).
4. Charge for the Summer Film Series this year (2024 / FY2025)--\$3.50 per seat or \$15 for the series. (Total possible revenue of \$875 or \$0.77 per person)
5. Emphasize increasing the number of classes taken (an increase of an average of 1 additional class per member per semester would raise approximately \$15 per member).

Total increase = \$38.9

## Appendix E: Membership Expansion - Objective 1

The following chart shows the difference between 8-12% increase in membership over the next 6 years. The red line is the break-even point assuming current annual member spend.



At a 10% increase per year (and holding AMS and expenses constant), the budget will be in balance by the end of June 2028 (in line with Specific Objective 1) .

A 13% increase per year (with the caveats above) would balance the budget by the end of June 2027.

Conversely, with an 8% increase per year (and accompanying caveats), the budget would be in balance by the end of June 2029.

## Appendix F: Membership Engagement - Objective 2

As shown, each additional member is currently contributing an average of \$172. Also shown is an increase of AMS to \$211 in FY2025.

With an AMS per average member of \$200, the break-even number would be 1,398 members.

With an AMS per average member of \$220, the break-even number would be 1,271 members.

## Appendix G: Additional Staffing - Resource Allocation 1

An increase in membership is going to create an additional burden on staff. Prior to the pandemic, we had four FTE (Full Time Equivalent) employees as well as a part-time administrative assistant and a student worker. Current staffing is three Full Time Equivalent (FTE) and two Part-Time Equivalent (PTE) personnel.

An additional staff member could cost approximately \$60,000 per year (including salary and benefits). Below are some basic benchmarks for looking at additional staff.

However, new staff is not likely to be an immediate need and therefore the cost of employing a FTE staff member would continue to rise. The following graph adds in an additional 3% for the first year and 6% for the second year.



Therefore, with an AMS of \$210 expectations would be to break even with one additional FTE at 1,705 members. With two additional staff the break-even would be 2,045 members.