California State University, Channel Islands

Strategic Plan - 2015-2018
Osher Lifelong Learning Institute (OLLI),
California State University Channel Islands
Strategic Plan - 2015-2018

I. Introduction 3

II. Overview of the Strategic Planning Process 3

III. Organizational and Environmental Context for Strategic Planning 3
   a. Strengths 3
   b. Weaknesses/ Areas Needing Improvement 4
   c. Opportunities 4
   d. Threats/Challenges/Constraints 4

IV. Mission and Vision 4

V. Strategic Goals 5

VI. Monitoring Implementation and Updating the Plan 9
Introduction
The Steering Committee of Osher Lifelong Learning Institute (OLLI), California State University Channel Islands conducted an extensive planning process in Winter, 2015. This strategic plan is the culmination of that process and sets forward a strategic direction for the next three fiscal years (2015-2018).

Overview of the Strategic Planning Process
OLLI has not previously developed a strategic plan. OLLI engaged Patty Oertel to facilitate the process. The process included extensive electronic surveys to Steering Committee (and its committee members) and OLLI members. In addition, Ms. Oertel conducted interviews with Dr. Richard Rush (President, California State University, Channel Islands), Dr. Gary Berg (Associate Vice President for Academic Affairs), and Nick Fuentes, Program Director. The input from the two electronic surveys and three interviews formed the foundation of a board retreat held on March 21, 2015. Based on the robust discussion during the retreat, a general strategic direction was set. Elements of the strategic direction were assigned to existing OLLI committees, to OLLI staff (Nick Fuentes), to retreat participants who volunteered to work on particular parts of the plan or were unassigned (the latter area can be revisited when volunteers interested in such areas have been recruited).

Organizational and Environmental Context for Strategic Planning
As part of strategic planning, it is useful for organizations to review their organizational and environmental context. Traditionally this process has been referred to as a SWOT analysis with the letters standing for Strengths, Weaknesses (outlined below as “Areas Needing Improvement,” Opportunities, and Threats (outlined below as “Challenges and Constraints”). An organization’s strengths provide a foundation upon which to build. An organization’s areas needing improvement do not necessarily preclude adopting any specific goal but do require initial work to address if the specific weakness would limit or interfere with successful implementation of a goal. Opportunities in the external environment in which an organization operates can signal options that should be pursued because of the favorable conditions surrounding the options. Threats identify challenges and constraints which existing in the external environment which might preclude a desired direction or which would need to be addressed before pursuing that direction.

Strengths
• quality of instructors, courses, students and volunteers
• the basic design and mission of OLLI.

Weaknesses/ Areas Needing Improvement
• improving the registration system
• need for improved communication and coordination between the committees, and between volunteers and staff members
• developing a more trusting interface with the university
• need for more community visibility
• parking (especially for teachers)
more equipment to benefit students (e.g., hearing loop and audio-visual equipment)
• addressing mobility concerns
• ensuring classrooms are accessible
• need for succession planning and documentation (so that OLLI is not dependent on the knowledge and records of any volunteer)
• having additional staff support.

Opportunities
• need to recruit and retain more members
• improving economy should provide more opportunities for enrollment
• community has become more than a group of learners (it is a community of relating and caring friends) and there may be ways to engage the community in support of OLLI
• opportunities for growing the program
• ability to fundraise in conjunction with the university
• filling empty seats

Threats/Challenges/Constraints
• students not returning because of administrative challenges
• fatigue of volunteers, etc.)
• external (any economic downturn would impact investments and discretionary income, etc.).

Mission and Vision
As part of this strategic planning process, the Steering Committee reviewed its mission statement (i.e., core ongoing purpose) and created a vision statement (i.e., a summary of its intended impact).

The current mission statement is:
The Osher Lifelong Learning Institute (OLLI) at California State University Channel Islands brings the excitement and stimulation of college learning to area seniors (50 or better!) who wish to extend their learning experiences in a university atmosphere.

The vision statement for the next three years is:
OLLI will continue the excellence of its current courses and ensure that all seniors in Ventura County are aware of its offerings and are able to attend courses at geographically convenient locations. To achieve that vision, OLLI will increase its membership to 800 by June 30, 2018. Specifically OLLI will expand its:
  - partnership with California State University, Channel Islands;
  - level of staff support;
  - efficiency and effectiveness of its systems; and
  - financial sustainability for ongoing programs and for the successful completion of its strategic goals.
Strategic Goals
OLLI has adopted the following six goals. When members of the Steering Committee, its committees or staff volunteered to be associated with a specific goal or objective, their name is listed in brackets.

Relative priority is indicated by A, B, or C: An A priority is vital and must be completed within the next year, a B priority is important and should be completed during the next year, a C priority may be an ongoing activity or something that would be nice to complete during the next year or a later year in the three year planning period.

Goal 1 - Program Development: OLLI will continue to offer its high quality courses and additional programs to fulfill its vision for 2018. [Curriculum Committee]

Objectives:
1. Instructor Recruitment: Develop strategies to recruit potential star instructors (given the drawing power of existing instructor stars).  
   C Priority
2. Instructor Profiles: Work with the Marketing and Outreach Committee to develop a strategy for featuring instructors through E-Blasts (e.g., Getting to Know You) and press releases/articles.  
   B Priority
3. Fresh Course Ideas: Continue to solicit input on ideas for courses.  
   C Priority
4. Course Metrics: Work with the Finance Committee and staff on the metrics needed to break even, make a profit and the variables that influence success from one term to another (e.g., Fall have 300 students; Winter having 450 students).
5. Course Locations: Work with the Steering Committee and OLLI staff to determine which locations would be ideal for OLLI classes.  
   B Priority
6. Beyond Courses: Develop a plan for how OLLI’s activities beyond courses (e.g., Taste of OLLI, Day Tours, Road Trips, Book Clubs) can produce positive net income and attract new customers for courses.  
   C Priority

Goal 2 - Operational Efficiency: OLLI will develop systems in order to provide a high level of customer service in an effective and cost-efficient manner support members, staff and volunteers.

Objectives:
1. Registration System: Work with Extended University to complete the purchase of, set up and full usage of a new registration system for all courses including meeting any specific needs for OLLI courses and activities.  
   Action Step: Discuss with the Marketing and Outreach Committee the types of questions to include on the registration form to be able to specifically assess the most effective ad placement (i.e., which ads in which magazines produce the most requests for catalog and the most enrollments).  
   A Priority
2. **Scholarships**: Formalize the process for providing the recently endowed scholarships (Hawthorne) including how they are promoted, awarded, etc.  
   **C Priority**

3. **Data Driven Marketing**: For each new and continuing strategy, determine how OLLI could test its effectiveness (i.e., having people request a catalog, having people enroll in their first course, etc.); how OLLI could capture that data (i.e., how they heard about OLLI, what prompted the person to enroll); and how that data can be analyzed against demographic information and with understanding timing influence  
   **B Priority**

4. Annual Assessment: Through either a member survey or assessment of unsolicited member feedback determine on an annual basis whether there are additional customer service issues that should be addressed.  
   **C Priority**

5. **Assess Member Data**: Assess current member and recent trend data for key variables such as gender, age, residence location (based on city or zip code), continuing member, periodic membership status (more than one year as a member, not continuous years), number of courses per year, etc. Note: While the survey conducted for planning purposes provides useful information to inform a planning process, it is not the full universe of members in contrast to data contained in OLLI’s database.  
   **Action Step: Key Correlations**: Based on the initial data analysis, determine if there are key correlations such as factors that lead an individual to sign up for their second course. Note: The second course is a key factor because of the high continuing rate of members. Factors might include: the quality of the instructor of the first course (star power instructor), having participated in Taste of OLLI/Day Tour/Rod Trip, location/ease of parking, etc.  
   **B Priority**

---

**Goal 3 - Marketing and Outreach**: OLLI will increase its name recognition through marketing and communication to increase course enrollment and membership.  

**[Marketing and Outreach Committee]**

**Objectives**:

1. **Geographic Service Area**: Assess the underlying demographics of the County of Ventura and its large cities in order to determine market size (i.e. the #s and characteristics of all residents over 50). This analysis can be completed through the AAA website which uses census data and interim survey methods to assess such population data as overall numbers, gender, income, ethnicity, language spoken at home, etc. This data will also help to establish a growth boundary for OLLI (i.e., when has it reached market saturation).  
   **A Priority**

2. **Marketing and Outreach Plan**: Draft an overall marketing and outreach plan that outlines who needs to be aware of OLLI, what they need to know and what would be the best form for delivering the message. As part of the plan, assess the cost and frequency of placement for advertisement in specific newspapers, periodicals, etc.  
   **A Priority**
3. **Demand Pricing:** The Steering Committee and OLLI staff shall determine if, when and how to use demand pricing (e.g., discounts intended to fill seats and for which the extent of the discount can increase the closer to the last day of enrollment).  

   **C Priority**

4. **Tailored Marketing for Courses:** For courses with new instructors or low enrollment, develop a tailored marketing plan that may include, but not be limited to: (a) email to members who previously took a course from the same instructor (strategy should especially be used for instructors with a following); (b) email/phone call outreach to clubs focused on the subject matter; (c) stand alone email promotions highlighting key attractive parts of the course (e.g., quotable comments from past students, enticing tidbit about the course content, etc.); (d) coverage of the instructor and specific course in local media, etc.  

   **B Priority**

5. **Tailored Marketing for Underrepresented Constituent Groups:** Based on the demographic and member usage analysis outlined above, identify any key market segments that enroll in OLLI courses at a significantly lower percentage than represented in the general population. Prioritize those market segments (e.g., gender, ethnicity, income level, geography, etc.) that are determined to be most key to both increased enrollment and other strategic goals. Develop a tailored outreach strategy for each market segment.  

   **C Priority**
Goal 4 - OLLI Financial Sustainability: OLLI will use financial analysis to determine necessary levels of revenue, expense, and investment in resources and programs.

Objectives:

1. **Financial Viability:** Determine revenue projections for current operations and growth projections based on number of courses, student/member enrollment and participation in programs and activities beyond courses. Make all assumptions explicit. Based on revenue and expense projections for current and proposed operations, develop break-even budgets (i.e., what would need to be the levels of revenue to cover all expenses, including new staff).
   **B Priority**

2. **Determine Staffing Needs for OLLI Program:** The Steering Committee will decide the level of staffing needed to achieve the 2018 vision. **Action steps:** Job description, financial analysis of costs/projected revenue for position.
   **A Priority**

3. **Revenue Strategies - Fundraising/Foundation Support:** Meet with the Vice President, University Advancement to determine how OLLI can work with the university to support OLLI’s needs for additional revenue and to coordinate its fundraising endeavors and consideration of submissions/requests to foundations and corporations. **Action Step:** Understand and document the processes required by the university for OLLI to raise money from individuals and/or to solicit contributions. **Action Step:** Discuss areas of mutual need such as greater support for individuals with disabilities, access and security from parking lots, etc.; determine processes for working together on joint requests. **Action Step:** Develop an implementation plan for fundraising and foundation support strategies as agreed upon during meeting with Advancement staff.
   **C Priority**

Goal 5 - OLLI Steering Committee and Volunteer Support: OLLI will have a Steering Committee with a composition, role clarity, committee and volunteer structure and processes to ensure that ongoing operations are effectively executed and to ensure the successful implementation of the strategic plan.

Objectives:

1. **Steering Committee Roles:** Clarify the roles of the Steering Committee and its committees in general, in relation to the strategic goals and in relation to staff support (i.e., which tasks/parts of tasks are the responsibility of volunteers and which are the responsibility of staff members). **Action Step:** Develop an organization chart differentiating responsibility, decision-making and execution. **Action Step:** Review bylaws to determine if other changes or clarifications are warranted (e.g., terms for committee leaders). [Gary/Nick] **A Priority**

2. **Volunteer Recruitment:** Develop and implement a plan for recruiting new volunteers. An initial option for recruitment would be to follow-up with members who expressed such an interest through their responses to the planning survey. **Note:** Because of predictability of turnover in its volunteer
base, OLLI needs to have strategies for regular recruitment and placement of volunteers.  

**B Priority**

3. **Orientation:** Develop a volunteer orientation process and materials (e.g., roles and responsibilities, overview of organization, strategic goals and frequently asked questions, etc.).  

**C Priority**

4. **Succession Planning and Documentation:** For each key function (e.g., Curriculum, Marketing, Finance, etc.), create a manual for how the function is currently performed with samples of documents and other processes used. Compile key files (paper and electronic) and provide a copy to OLLI staff to maintain. Develop a succession plan (e.g., leadership track) for how committee leadership will groom new leaders and a timeframe for leadership transition.  

**C Priority**

5. **Mission Statement:** Based on retreat discussion, review mission to determine if adjustments should be made. Bring to a Steering Committee meeting for presentation and adoption.  

**B Priority**

---

**Goal 6 - University and Osher Relations:** OLLI will enhance its relationships with the California State University, Channel Islands community and the Osher Foundation.

**Objectives:**

1. **University Relations:** Develop a plan for how OLLI and its staff representative can deepen awareness of OLLI and connections between OLLI and the university. Activities may include: regular meetings with University and extended learning leadership; regular reporting by staff on university meetings in OLLI’s work is covered; exploring a relationship between OLLI and the gerontology program, etc. Periodically discuss at the Steering Committee level to determine how these efforts are faring and whether additional or different efforts should be considered.  

**A Priority**

2. **Osher Foundation:** Continue to have ongoing communication with the Osher Foundation regarding options for securing additional funding (e.g., special projects such as $15,000 for marketing efforts, meeting a member threshold/coupled with meeting fundraising targets - dollars raised and percentage of members giving, etc.).  

**C Priority**

---

**Monitoring Implementation and Updating the Plan**

All strategic plans are “works in progress”; they should be adjusted based on new knowledge of conditions, opportunities presented and lessons learned through implementation.
Strategic plans are most effectively implemented when there is shared responsibility between the board of directors or Steering Committee, management, staff members and the community. In the implementation plan, responsibilities for goals, objectives and action steps have been assigned to specific committees or individuals. All members of the Steering Committee should actively participate by sharing their time and energy to assist with implementation of all goals.

To ensure its success in implementing the strategic plan, the Steering Committee should review progress toward implementation on a quarterly basis.