



**OSHER LIFELONG  
LEARNING INSTITUTE**

***“Curiosity Never Retires”***

**Osher Lifelong Learning Institute (OLLI)**

**California State University Channel Islands**

***Strategic Plan - 2015-2018***

***Updated and Revised, June 2016***

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

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## **Introduction**

The Steering Committee of Osher Lifelong Learning Institute (OLLI), California State University Channel Islands conducted an extensive planning process in Winter, 2015. In Spring, 2016 the planning process was continued with a one day planning retreat held with the Steering Committee and selected OLLI committee members, Program Director, Nick Fuentes, and Program Coordinator, Courtney Gross. This revised strategic plan is the result of the 2016 process and sets forward a strategic direction for the next two fiscal years (2016-2018).

## **Overview of the Strategic Planning Process**

Steering Committee members Diana Troik and Randy Richardson conducted year 2 of the planning process. The process included a survey to retreat participants and a survey sent to all OLLI members. The input from the two surveys formed the foundation of a board retreat held on June 2, 2016. Based on the discussion during the retreat, the Strategic Vision was revised, priority Objectives for the coming year were developed and a beginning was made in defining the OLLI culture. Participants volunteered to work on specific "A" priority Objectives.

## **OLLI Values, Beliefs and Norms**

Diana defined culture as follows and suggested that in the future OLLI would need to begin managing its culture.

**Values:** Values are the things an organization considers most important with respect to its operations, its customers and its staff. These are the things an organization holds most dear - the things for which it strives and the things it wants to protect at all costs.

**Beliefs** are assumptions individuals hold about themselves, their customers, and their organization.

**Norms** are unwritten rule of behavior that address such issues as how people dress and interact.

The organizational culture is, in essence, a guide to behavior as well as a mechanism for creating expectations for the future with respect to rewards and action.

Retreat participants were divided into pairs and asked to define the values, beliefs and norms of the OLLI culture:

### Values

Intellectual curiosity, learning  
High quality education, no basket weaving  
Quality atmosphere  
Social interaction, everyone is important  
Catalogs tell our story

### Beliefs

Excitement, motivation  
Participation with service, sharing  
Curiosity never retires  
Quality education without tests, papers

### Norms

Civil, respectful interaction, differences of opinion are respected  
Engaged, consistent quality  
Respect for professors, students  
Adults interacting with adults

### **Organizational and Environmental Context for Strategic Planning**

Planning retreat participants answered several questions in regard to the most critical issues that needed to be addressed in the retreat as well as their views on OLLI's strengths, areas needing improvement, opportunities and threats in the environment. The survey results are shown below:

#### Critical Planning Issues

- Growth along the 101 corridor in a timely manner as approved by the SC in Nov. 2015 - Agoura, Ventura, Camarillo off-campus
- Sites for classes - more rooms at the university and off site
- Consistent access to good venues with adequate seating
- Balance between growth and fiscal responsibility
- Define roles of volunteers/committees relative to roles of Nick and Courtney
- Clarification of decision-making between committee members and staff
- Deciding whether and to what purpose we want to engage in major fund raising efforts
- Do we need a separate facilities committee?
- Are there new initiatives that might help us recruit teachers and students, such as four week classes rather than eight week classes?

#### Strengths

- Great instructors
- Variety of classes
- Diversity of offerings
- Unique product to offer to potential members
- Active group of volunteers involved in program oversight and other services
- Extended University appreciation of OLLI
- Family atmosphere

#### Weaknesses/ Areas Needing Improvement

- On line registration and MyCi implementation
- Improved recruitment of volunteers
- Leadership/volunteer burnout
- Improved role definition and training for volunteers

- Recognition of volunteers
- Better communication among all committees, including SC
- Better communication between the OLLI Director and the SC and other committees, decisions should be made with SC input.
- More communication of enrollment and financial data to all volunteers
- Clearer definition of role of SC relative to other standing committees
- Greater visibility on campus
- More recruitment of CI faculty for OLLI
- Making decisions at SC without looking at past practices and the impact of those decisions
- Continue efforts to be accessible to all students, i.e. those with hearing, vision or mobility issues

### Opportunities

- Demographics - recruit younger members including those 50 plus not yet retired.
- Continuing to keep members excited about the program
- Development of a speaker's bureau
- May be eligible for grants
- Improvement in university budget situation
- Outreach to communities we serve
- Increase recognition with local colleges
- Increase diversity of membership
- Build stronger relationships with existing organizations in our area - AAUW, healthcare districts, senior centers.
- New CI President and Provost

### Threats/Challenges/Constraints

- Impact of university bureaucracy
- Shifting priorities in university that could reduce support
- Parking and transportation
- Increased costs of classroom space
- Continued increases in administrative costs allocated to OLLI
- Need to keep prices affordable
- Major economic downturn affecting members' ability to pay for courses

### **Mission and Vision**

The Steering Committee revised its Mission Statement (i.e., core ongoing purpose) to substitute “adults” for “seniors” which was seen as being more appealing to a younger demographic.

The revised 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 **adults** (50 or better!) who wish to extend their learning experiences in a university atmosphere.*

The Steering Committee also revised its Strategic Vision Statement (where it wants to be by June, 2018, the end of the planning period) to reflect the achievement of having reached the 800 member level in this current year.

*OLLI will continue the excellence of its current courses and ensure that all adults (50 or better) 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 1,000 (10% growth per year) by June 30, 2018. Specifically OLLI will expand its:*

- o partnership with California State University, Channel Islands;*
- o level of staff support;*
- o efficiency and effectiveness of its systems; and*
- o financial sustainability for ongoing programs and for the successful completion of its strategic goals.*

### **Strategic Goals**

OLLI has adopted the following six goals (categories). 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 bold next to the priority.

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, Ongoing, Curriculum Committee**
2. *Instructor Profiles:* Provide data to MOC for featuring instructors through E-Blasts (e.g., Getting to Know You) and press releases/articles. **A 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). **C Priority**
5. *Course Locations:* Secure sites along the 101 corridor - Agoura, Ventura, Camarillo off-campus **A Priority - Randy, Andy, Courtney**

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. *Implementation of OnLine Registration*: 60% of members using online registration by Spring 2017. *Action Steps*: 1) Have online system testable by committee members by July 15th, 2) Have three training sessions in computer lab before start of registration, schedule around Taste, 3) Have a call line set up at start of registration with scheduled help for those who need assistance, 4) Develop detailed instructions with videos on website; reference website in catalog and training sessions, 5) Recruit volunteers to help with training **A Priority - Courtney, Jerry, Elaine, Gary**
2. *Scholarships*: Formalize the process for providing the recently endowed scholarships (Hawthorne) including how they are promoted, awarded, etc. **C Priority, Completed**
3. *Scholarships*: Establish a process for scholarships that includes: how the student is identified, how the student applies, how the scholarship is marketed, how the scholarship is administered, what is the follow-up afterward? **B Priority**
4. *Data Driven Marketing*: All data available for storage and retrieval in organized fashion in university database maintained by OLLI Director and/or Coordinator, including establishing a database for tracking referrals **B Priority Courtney**
5. *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**
6. *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. [Nick] *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.* **C 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. **A Priority, Completed**
2. *Marketing and Outreach Plan:* Revise the 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. **C Priority,**
3. *Featured Instructors:* 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. **A Priority, MOC, data from Curriculum Committee**
4. *Tailored Marketing for new Locations* - Launch strategy, team, also enhance current locations **A priority, MOC, Curriculum Committee**
5. *BiWeekly Newsletter* - short one page summary of current items and accomplishments **B priority**
6. *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. *Budget* - Continue maintaining a budget so that fees cover expenses. **C 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, Completed**
3. *Pursue \$10,000 of grants* (in addition to the \$25,000 Osher grant) and formalize a process within the organization to facilitate grant application (i.e. grant committee) **B Priority**
4. *Develop a robust Fundraising Function:* Action steps: 1) Create a fund raising committee, 2) Donor recognition with thank you notes and levels of giving, 3) Planned giving, 4) OLLI-sponsored (donated) infrastructure items, 5) Setting priorities: Scholarships, expansion and accessibility, 6) Raise more money at OLLI FEST **A Priority, Jerry, Nick, Courtney, Elaine**

**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 Steering Committee and other standing committees roles relative to the roles of Nick and Courtney, which tasks/parts of tasks are the responsibility of volunteers and which are the responsibility of staff members). **A Priority, Nick, Diana, Randy, Arlene**
2. *Volunteer Recruitment and Documentation:* Action Steps: 1) Develop and implement a plan for recruiting new volunteers, 2) Define committee roles, how each function is performed, including succession planning, 3) Develop orientation process and materials (e.g. roles and responsibilities, overview of organization, strategic goals and FAQs) for volunteers, 4) develop plan for volunteer recognition. **A Priority, Gary, Courtney, Elaine, Su, Arlene**

**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:* 1) Co-sponsor campus events, i.e. Martin V Smith lecture series, 2) Build relationship with PMG, 3) Participate in mentoring programs with undergraduate and graduate students, 4) Reach out to CI students, newspapers, CI View **B Priority**

2. *Osher Foundation*: Resubmit for Osher \$25,000 grant in the next two years . B  
Priority Nick

### **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 Steering Committee, 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 and plan for an annual retreat in June, 2017.