

Summary of the OLLI at SOU 2020 Strategic Plan Draft

In March 2015, the OLLI at SOU Council established a ten-member task force to create a five-year strategic plan to ensure the continuing success of the organization and to meet the future needs of its members. This strategic plan is a vision of OLLI's future and the basic steps required to achieve that future. We encourage you to read the four-page summary and/or the complete thirty-page Strategic Plan Draft which is available on the OLLI website, or in the Ashland or HEC office. We look forward to your input and appreciate your participation.

Please join us at any of the three 2020 Strategic Plan Town Hall meetings.

Monday, February 8th, 1-2:30 pm, Campbell Center, Room E

Thursday, February 11th, 11:00am-12:30pm, Medford HEC, Room 321

Tuesday, February 16th, 11:00am-12:30pm, Campbell Center, Room E

From the beginning, Task Force members charted a course that sought to make the most of OLLI's longevity, reputation, community, and volunteer resources. Our work began with interviews of community-wide stakeholders and focus group meetings with instructors and members. Using this input, the Task Force created OLLI's Mission, Vision, and Value statements. These three statements became our guiding principles as we identified sixteen goals with accompanying initiatives to focus OLLI's work for the next five years.

Mission: (purpose/focus)

OLLI at SOU is a member-driven educational community serving adults primarily ages 50 and older. We offer a diverse repertoire of stimulating courses and programs designed to foster lifelong learning, encourage social interaction, and provide cultural enrichment.

Vision: (what we desire to be)

OLLI at SOU members will find intellectual stimulation, enjoyment, and invigorating learning opportunities in a comfortable, safe, supportive, and congenial environment.

Values: (what we believe in)

We believe in the joy of learning and recognize the vital relationship between creative expression, intellectual stimulation, social interaction and healthy aging.

We value a curriculum of depth and breadth and promote programs that inspire our members to participate in the OLLI community.

We promote activities that energize and enable our members to share their skills, talents, and time.

We pursue excellence and measure our success by our members' satisfaction with our curriculum, affordability, social opportunities, staff, and leadership.

OLLI at SOU's Strategic Goals

The 16 goals listed below are meant to focus the organization's energy and prepare OLLI for a membership of 2,000 by 2020, a level commensurate with our average historic growth rate of five percent. We anticipate that, given the investments made in the last three years to strengthen our volunteer program and office operations, the goals and initiatives can be accomplished without increasing the number of staff positions. A systematic study of OLLI's venues and utilization rates proved invaluable as it clarified that there was no need for a new building based on a lack of available classrooms. However, Campbell Center deficiencies and consideration for a renovation are included in the Plan.

1. Member engagement and satisfaction shape programs, activities, and operations.
2. OLLI offers a diverse array of educational opportunities that address members' interests in intellectual, cultural, recreational, and personal exploration.
3. To meet members' learning preferences, a wide variety of formats is available, such as lecture and discussion courses, community-wide events, Shared Interest Groups (SIGs), online learning, field trips, and travel.
4. Courses are of high quality, with well-trained volunteer instructors recruited from the membership, the University, and the community.
5. Numerous opportunities exist for OLLI members to interact socially, develop friendships, share interests, find companionship, and experience a sense of community.
6. Members engage in OLLI's wealth of volunteer opportunities.
7. The methods of communication with OLLI members, instructors, and prospective members are comprehensive and inclusive.
8. OLLI's Medford campus provides the local community with a diverse offering of courses and programs that include intellectual stimulation, social interaction, volunteer opportunities and cultural enrichment.
9. The organization's governance structure is defined, shared, and well-understood by Council, committee chairs, the OLLI Program Manager, and the SOU Executive Director of Outreach and Engagement.
10. Staff roles, responsibilities, and operational processes are defined and well-understood by all staff, Council, and committee chairs.
11. OLLI actively builds awareness of its mission and offerings with individuals and local organizations serving older adults and supporting lifelong learning.
12. OLLI collaborates and shares resources with the Osher National Resource Center, other Osher Institutes, SOU, and the SOU Foundation.
13. OLLI is financially sound with a balanced annual budget and sufficient reserves.
14. Members benefit from the affordable fees and scholarship assistance.
15. Members and organizations consider OLLI a desirable channel for their charitable giving.
16. Facilities used for courses, events, activities, and staff operations provide a comfortable, safe, supportive and congenial environment conducive to learning, working, and socializing.