



OLLI at SOU  
Strategic Plan 2030

# Background

- Need to replace 2025 Strategic Plan
- Identify the current strategic issues facing OLLI at SOU
- Ad Hoc committee formulated
- Committee has been meeting since November 2024

## Ad Hoc Committee

- Ad Hoc Committee Chair/Co-Chairs: Phyllis Fernlund (Past President) and John Schuyler (Vice President)
- OLLI Council President: Laura Simonds
- One additional OLLI Council Director: Paul Christy (Treasurer)
- OLLI Past Council Directors: Tracy Palermini and Elisabeth Zinser
- OLLI Members: Tom Woosnam (Instructor) and Cathy Prazenica (Committee member)
- OLLI Administrative Director: Heather Inghram

# Process

- Review Mission, Vision and Values
- Review existing information (2025 Strategic Plan, member surveys, finances, etc.)
- Background information on Strategic Planning (Lorraine Vail)
- SWOT analysis
- Subcommittee Interviews:
  - OLLI Staff
  - Past OLLI leaders
  - SOU president and provost
  - SOU Vice President, University Foundation
  - Rogue Valley Manor
  - Chairs/Liaisons/Directors
- Survey non-renewing members
- Develop goal statements
- Review other OLLI's strategic plans
- Craft strategies, initiatives and metrics for each goal
- Write Plan

## SWOT Results

- **Strengths:** superb staff, dedicated volunteers, member enthusiasm, quality of instruction, wide range of courses, demonstrated capacity to adapt/pivot quickly, upgraded facilities and technologies
- **Weaknesses:** paucity of volunteers, lacking younger members and diversity, underachievement in retaining new members, cumbersome course proposal process, limited social opportunities, decline of online courses, limited spaces for movement and art
- **Opportunities:** Incoming members more tech savvy for digital innovation, night and weekend classes, untapped venues north of Ashland, strategic partnerships, future senior living center, expand access to the Osher National Resource Center resources and other OLLIs
- **Threats:** internal resistance to growth and fee increases, waning volunteerism with risk of burn-out among dedicated leaders, increasing competition among non-profits for participation and giving, pace of technology changes

## Draft Goals

- **Sustainability:** Assure a stable balance of finances and membership growth to sustain OLLI.
- **Curriculum:** Maintain and create high-quality learning opportunities that inform, educate, and entertain members, led by engaged and well-versed instructors.
- **Connections:** Facilitate connections amongst our members and within our communities to promote cultural enrichment, learning, and social interactions.
- **Structure:** To build and strengthen a top-notch organization of volunteers, staff, partners, and locations.

# Example Strategies

- Sustainability
  - Grow membership
  - Diversify revenue sources
  - Evaluate & modify the uses of OLLI funds
- Curriculum
  - Increase online course offerings
  - Find new venues and create intergenerational opportunities
  - Evaluate member engagement in evening and weekend offerings
- Connection
  - Facilitate member-driven groups
  - Host events that provide social engagement
  - Seek out interesting and culturally enriching content tailored to members
- Structure
  - Determine and implement the best balance of volunteers and staff
  - Establish term limits and succession planning for committee chairs
  - Utilize established resources (such as NRC, SOU, community partners) to learn best practices
  - Establish and promote SOU/RCC and community partnerships for facilities, marketing/media, and sponsorships

## Next Steps

- Continue work on strategies, initiatives and metrics
- Town Hall meeting at Campbell Center: March 12<sup>th</sup>
- Provide draft plan in time for the April Council meeting
- Submit final plan for adoption at May Council meeting