



Mission Statement

The Osher Lifelong Learning Institute provides a broad program of educational and social opportunities for a diverse audience of mature adults as an integral part of the University of Cincinnati's outreach to the community.

Vision Statement

OLLI is the premier organization offering educational and social experiences to the mature residents of Greater Cincinnati by:

- Nourishing intellect, expanding knowledge, and exploring new ideas
- Sharing interests and experiences
- Cultivating friendships
- Being a resource of the University of Cincinnati and supporting its goals

Value Statement

OLLI at UC is a diverse community of learners valued for their unique backgrounds, experiences, and perspectives.

2020 Strategic Plan

A Vision for the Future

Introduction

This Strategic Plan for the Osher Lifelong Learning Institute at the University of Cincinnati has been prepared by a group of OLLI volunteers at the request of the OLLI Board of Trustees. The plan is for the period 2020–25. Once accepted, implementing and monitoring the plan are the responsibility of the OLLI Board of Trustees, as the governing body.

The Strategic Planning Committee chose to focus on two objectives—Diversity and Quality—with supporting goals and strategies. We expect that fulfilling these, coupled with OLLI’s historic growth patterns and current capacity, will bring OLLI’s annual unduplicated membership to between 2,500 and 2,700 by 2025.

Several elements must exist for this plan to be successful. Some of these elements, such as measures and timetables, are built into the Strategic Plan. An individual (probably a Board member) should be responsible for implementing the plan and delivering results and will be appointed by the Board Chair. That individual, assisted by staff, may assign responsibility for appropriate action plans and sub-strategies to OLLI committee chairs and others. These individuals, the Program Director, and the Board must routinely review progress and results and adjust the plan to meet changing needs.

To succeed, the Strategic Plan requires a commitment by the entire organization, flowing from the Board and staff throughout the organization.

OLLI 2020 Strategic Planning Committee: Tom Noonan, chair; Carol Heideman; Nancy Herbert; Doug Iden; Georgetta King; Cate O’Hara; Greg Rhodes; Elisa Victor; Bob Wilhelmy; Thane Brown, facilitator; Karen Zaugg, recorder; Marv Heller; and Brenda Gatti, ex officio.

Addendum

Since 2020, OLLI has experienced changes in its historic growth trajectory primarily as a result of Covid. In addition, as a result, in response to ongoing National conversations on race and equity, the University of Cincinnati has re-committed the institution to inclusive excellence. In order to address both of these major changes, a small group of OLLI members met during the Summer of 2022 to review and clarify the 2020 Strategic Plan document.

The original Strategic Planning Committee chose to focus on two primary goals—Quality and Diversity—with supporting strategies and measurements. The Review Team has added Rationales for each goal, updated Strategies and Measurements, and clarified language.

OLLI is an educational, non-profit organization and as such is focused on appealing to a broad and diverse segment of “customers.” To increase membership while maintaining its Vision, Mission, and Values, OLLI must continually offer high quality curricular options that provide diversity of experiences and perspectives and appeal to a wide variety of individuals. As forecast by the original 2020 Strategic Planning Committee, the Review Team fully expects that striving to achieve the Quality and Diversity Goals will strengthen OLLI and result in increased membership through improved retention rates among existing members and an increase in enrollment of new members across a broad spectrum of interests and experiences.

The OLLI 2022 Strategic Plan Revision Group: Sandy Crawfis, Board Chair; Robert Brackenbury; Marv Heller; Jennifer Manoukian; Greg Rhodes; Margaret Scholz; and Cate O’Hara, ex officio

Quality Goals

Rationale: OLLI's stated Mission, Vision, and Value Statements strongly align with the University of Cincinnati's commitment to inclusive excellence. This commitment requires that the entire OLLI program focus on continuous improvement in the quality of curriculum, moderators, financial decisions, leadership, and social interaction. Specific goals in each area will be set and measured annually and the results shared with the Board of Trustees.

CURRICULUM

GOAL: Provide a diverse, comprehensive, and balanced curriculum that will appeal to a variety of members.

STRATEGIES: Working in partnership with Marketing, the Curriculum Committee's academic teams will identify course needs and recruit moderators to lead classes in the various disciplines. In addition, OLLI should continue to evaluate the quality and effectiveness of academic programs through member feedback.

MEASUREMENT: With the help of data from Marketing surveys and member feedback, each academic team will set annual goals specific to the identified needs and desires of OLLI members. Each academic team will provide written progress reports to the Curriculum Committee and an annual summary report to the Board of Trustees.

MODERATORS

GOAL: Continue to ensure moderator success through orientations, mentoring, professional development opportunities, and member feedback.

STRATEGIES: Gateways Orientation sessions for new multi-week moderators as well as introductory sessions for one-time presenters will be held prior to the beginning of each academic term. The results of member feedback will be provided to all moderators with follow-up when necessary. Professional development opportunities will be offered at least annually.

MEASUREMENT: Moderator Support will submit an annual report to the Curriculum Committee of numbers of new and veteran moderators served by orientations, professional development, and mentoring.

FINANCE

GOAL: Manage resources, including accumulated surpluses, donations, and expenses.

STRATEGIES: The Budget and Finance committee, working with the Managing Director, will produce an annual balanced budget while maintaining a prudent reserve.

MEASUREMENT: Maintain a minimum of \$50,000 in reserve funds.

LEADERSHIP

GOAL: The Board of Trustees is composed of members representing a broad range of experience and viewpoints.

STRATEGIES: Develop experienced candidates for the OLLI Board, primarily through strong committee structures and professional workshops. Recruit new committee members as necessary.

MEASUREMENT: Standing Committee chairs will identify their new committee members annually. The Governance Committee will identify potential new Board of Trustee members who bring to the Board leadership and other valuable attributes, including prior experience as an OLLI volunteer, such as service on a committee or as a moderator

MARKETING

GOAL: Explore and identify a variety of advertising methods and options, future course needs, and desired social opportunities, especially those reaching underrepresented populations.

STRATEGIES: Working in partnership with the Diversity Committee and the Curriculum Committee, Marketing will conduct an annual survey of membership to determine the effectiveness of various advertising methods as well as to determine future course needs and types of social interactions outside the classroom desired by OLLI members.

MEASUREMENT: Marketing will provide an annual report to the Board of Trustees, including the results of the annual survey.

SOCIAL

GOAL: Encourage social interaction among OLLI members outside the classroom.

STRATEGIES: Use the annual survey to poll members about the social activities that would interest them. Ensure that members may advertise their activities or ideas for activities through OLLI email notices.

MEASUREMENT: The Friends of OLLI and Hospitality Committee will submit an annual report to the Board of Trustees of the number of participants in their standard activities.

Diversity Goal

Rationale: OLLI strongly supports and aligns with the University of Cincinnati's commitment to inclusive excellence. To fulfill the goal of increasing diversity among OLLI members, moderators, leaders, and volunteers, OLLI aims

- **To be open and welcoming to all members of the Cincinnati community.** The disparity between the rich diversity of Cincinnati's community and the limited diversity within OLLI clearly indicates, however, that we have yet to achieve this goal. This discrepancy underscores the rationale for our plans to work with partners in the community to identify the reasons for the disparity and to devise and implement strategies to ensure that our organization welcomes and includes everyone.
- **To value and encourage all individuals in our OLLI community to grow.** Multiple studies have established that learning and innovation are higher in diverse settings, so our goal is to provide a high-quality, diverse, inclusive, and equitable learning environment that gives all members the ability to participate fully in the enjoyment and teaching of classes and in the planning and administration of OLLI programs.

DIVERSITY

STRATEGY: Create an on-going non-standing Diversity Committee, including representatives of standing committees and other OLLI members to champion diversity, equity, and inclusion in all areas of OLLI. The committee may connect with Greater Cincinnati organizations for benchmarking, collaboration, and advice.

MEASUREMENT: The Diversity Committee should be selected, chaired, and ready to meet on or before December 31, 2022.

STRATEGY: Develop and recommend goals to advance diversity, equity, and inclusion in a variety of ways. Provide action plans for recommended goals. Present these goals to the Board of Trustees by August 31, 2023.

MEASUREMENT: Present an annual report to the Board indicating OLLI's progress on recommended goals.

CURRICULUM

STRATEGY: In conjunction with the Diversity Committee, the Curriculum Committee will increase recruitment of a wider range of moderators.

MEASUREMENT: Plans to recruit and identify the ethnicity of new moderators were devised in Spring 2020. The Curriculum Committee will continue these efforts and provide an annual report to the Board of Trustees.

MARKETING

STRATEGY: Working in partnership with the Diversity Committee, Marketing will continue to focus on attracting new members representative of the demographic make-up of the Greater Cincinnati area.

MEASUREMENT: Annually report to the Board how marketing materials and strategies were utilized to increase the membership of underrepresented populations.