



## **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. 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.

# Quality

## OBJECTIVE:

Improve the quality of the entire OLLI program—curriculum, moderators, finance, leadership, and social. Evaluate progress and procedures annually.

### ***CURRICULUM***

GOAL: Be proactive in developing a diverse, comprehensive, and balanced curriculum.

STRATEGIES: Utilize Curriculum Committee’s academic subcommittees to identify needs and recruit moderators to lead classes in the various disciplines.

Establish methods for evaluating the quality and effectiveness of academic programs.

MEASUREMENT: Establish a baseline and set numeric goals for improvement. Evaluate annually.

### ***MODERATORS***

GOAL: Fully implement the RATE program (Recruitment, Application, Training, Evaluation/Encouragement) for both new and veteran moderators.

STRATEGIES: Establish procedures to ensure moderator success.

MEASUREMENT: Establish baselines and set numeric goals for improvement before fall 2020.

### ***FINANCE***

GOAL: Manage revenue, including accumulated surpluses, and expenses to be at minimum break-even level.

STRATEGIES: Produce an annual balanced budget while maintaining a prudent reserve.

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

### ***LEADERSHIP***

GOAL: All Standing Committees, as defined in the OLLI Bylaws, have chairs and vice chairs.

STRATEGIES: Establish a process for identifying ongoing leadership needs for committees and methods for recruiting new leaders.

MEASUREMENT: Ensure that each Standing Committee has a chair and vice chair no later than Spring 2020 and maintain.

### ***SOCIAL***

GOAL: Strengthen social interactions for OLLI members.

STRATEGIES: Foster social programs and special interest groups such as book clubs, movie/theater nights, etc.

MEASUREMENT: Executive Committee to review and tabulate annually the publicized social opportunities.

# Diversity

## OBJECTIVE:

Increase diversity among OLLI learners, moderators, leaders, and volunteers.

GOAL: By 2025, achieve at least 1% increase of total OLLI membership annually over the prior year in minority involvement in all areas.

## STRATEGY:

Create an ad hoc committee, including representatives of standing committees, to champion diversity in all OLLI areas.

MEASUREMENT: Committee selected, chaired, and ready to meet on or before July 1, 2020.

- Develop a methodology to measure diversity.  
MEASUREMENT: Methods in place by September 1, 2020.
- In conjunction with Marketing Committee, continue marketing focus on attracting minorities, representative of the demographic make-up of the Greater Cincinnati area.  
MEASUREMENT: Spend at least 25% of marketing funds annually on attracting minorities.
- In conjunction with Curriculum Committee, recruit moderators.  
MEASUREMENT: Devise plan for recruitment by September 1, 2020, and begin recruitment effort by October 1, 2020. Measure same at end of each moderator recruitment cycle beginning spring 2021.