

**The Osher Institute  
for Lifelong Learning  
at the  
School of Professional  
and Continuing Studies  
University of Richmond**

CELEBRATING

---

10  
OSHER  
LIFELONG  
LEARNING  
INSTITUTE  
**YEARS**

---

AT THE UNIVERSITY  
OF RICHMOND

**Strategic Plan**

December 19, 2014



## Executive Summary

### Osher Institute for Lifelong Learning at the University of Richmond Strategic Plan

At the direction of the Dean of the School of Professional and Continuing Studies, the Osher Institute for Lifelong Learning at the University of Richmond embarked on a strategic planning process in June 2014. The objective of this planning process was to assess current conditions and trends and identify near-term and longer-term initiatives to enhance and improve the program for lifelong learning at UR.

As its mission states, the Institute creates a “community of mature lifelong learners engaged in stimulating and fun learning activities in an academic setting.” Several Osher members volunteered to serve on a small team to develop the plan and have given countless hours to this work. The team was co-chaired by the Osher Director, Peggy Watson, and George Pangburn, Vice-Chair of the Leadership Council.

The planning team first met in June 2014 and over the months that followed, identified a four-pronged approach to the development of the plan:

- A. Data Analysis - collecting and analyzing existing membership and registration data
- B. Member Survey – soliciting and analyzing information about our members not available in existing data
- C. Synthesis - reducing the results of the data analysis and survey into strategic issues or themes for the plan itself
- D. Workshop – hosting a half-day session with key Osher members to discuss possible strategic actions

As a guiding principle the team sought to strengthen an already strong program to ensure sustainability, which will result in moderate growth in membership through reduced attrition. Based on the results of the Data Analysis and the Survey the planning team identified five strategic themes:

1. Keep Our Core Membership Participating
2. Attract and Keep New Members
3. Continue to Build and Enhance Existing UR Relationships
4. Increase Inclusion
5. Expand Outreach in the Greater Richmond Area

The planning team developed initiatives to further the strategic themes for the Institute over the next several years. The planning team sought to avoid the tendency in strategic plans to overcommit and under-deliver by only identifying one initiative per theme for 2015, with others to be addressed in 2016 and beyond. The Leadership Council and the Osher Director will monitor progress throughout 2015 and identify target initiatives to be addressed in 2016 and beyond as appropriate.

Following are the initiatives for 2015:

#### 1. **Maintain/enhance focus on quality of course content:**

In the membership survey, 80% of respondents indicated that Osher courses were very important to their satisfaction with Osher at UR, the highest component of satisfaction recorded in the survey.

To assure continued satisfaction, we should continue to evaluate instructor effectiveness through review of course evaluation forms and consider revising the forms to get more input from members on program wants and needs.

Review membership survey to identify new course opportunities or other enhancements in the near term that reflect member interests and preferences.

Leads: Osher Staff, Curriculum Team

## **2. Increased Communication with New Members**

One way to help assure that new Osher members remain Osher members is to assure that they feel valued and “plugged-in.” Possible activities to support that might include:

- Welcoming new members to each class
- Creating a buddy system between new members and experienced members
- Following up with new members by post cards/email.

Leads: Osher Staff, Leadership Council, Leader Support Team, Membership Team

## **3. Osher Member Support to Various UR Functions**

Develop a plan for Osher volunteers to give back to the University by donating their time: in campus tours, at the Boatwright Library, during class registration, throughout Homecoming weekend, or wherever it would be most beneficial to UR.

Leads: Osher Staff, Marketing Team, SPCS and other appropriate UR Staff/Leadership

## **4. Enhance the Makeup of Our Membership Base**

Develop and begin implementation of a plan to enhance the makeup of our membership base through Osher presentations to 55+ communities, professional and social organizations, churches, and community centers. It should focus on areas not currently served by other lifelong learning centers and should include mission-related classes or programs that Osher-UR could start that would increase our inclusion.

Leads: Osher Staff, Marketing Team, Membership Team, SPCS Leadership

## **5. Expanded Outreach in the Greater Richmond Area**

Expand our partnerships to include new and diverse outside entities, such as the American Revolution Roundtable, major Richmond area health care providers, New Virginians, and others.

Leads: Osher staff, Leadership Council, Marketing Team

**The Osher Institute for Lifelong Learning  
at the  
School of Professional and Continuing Studies  
University of Richmond**

**Strategic Plan  
December 19, 2014**

---

## **1. Introduction**

At the direction of the Dean of the School of Professional and Continuing Studies, the Osher Institute for Lifelong Learning at the University of Richmond (Osher at UR, or the Institute) embarked on a strategic planning process in June 2014. The objective of this planning process was to assess current conditions and trends and identify near-term and longer-term initiatives to enhance and improve the program for lifelong learning at UR.

This plan documents that process and is organized into five sections: introduction, background on Osher at UR (Section 2), methodology and findings of the planning process (Section 3), strategic initiatives to be undertaken by the Institute (Section 4), and a summary and next steps (Section 5).

## **2. Background**

Osher at UR, now in its tenth year, is a membership-driven endowed grant program that provides classes, activities, lectures, events, and interest groups for people 50 and better. As its mission states, the Institute creates a “community of mature lifelong learners engaged in stimulating and fun learning activities in an academic setting.” There are no entrance requirements, no tests, and no grades. In fact, no college background is needed at all—only a love of learning.

Established in 2004 at the University of Richmond through an endowment from the Bernard Osher Foundation of San Francisco, our membership organization offers an extensive array of courses in the liberal arts in the fall, spring and summer semesters. These offerings are a combination of undergraduate credit courses for audit, special interest mini-courses, free lectures, performing arts events, and more.

### **The Bernard Osher Foundation Funding**

The University of Richmond’s institute is one of 119 endowed institutes across the United States. While similar in purpose, each is unique in its structure and its offerings to best meet the needs of its members. As noted on its web site

... the Foundation has not been highly prescriptive in the type of lifelong learning program it has chosen to support. While there is considerable variation among the Osher Institutes, common features remain prominent: Non-credit educational programs specifically designed for seasoned adults aged 50 and older; strong support from the leadership of the university or college; a diverse repertoire of intellectually stimulating courses; robust volunteer leadership; established

mechanisms for evaluating participant satisfaction with educational offerings; and sound organizational structure. The characteristics shared by all Osher Institutes strengthen the possibility that the individual institutes will become not only successful, but programmatically and financially sustainable.

The ability to tailor the Osher Institute to address desires and needs of the members has allowed the University of Richmond's Institute to create and maintain a unique identity within the University, throughout the Richmond metropolitan area, and beyond.

### **History Within the University of Richmond**

Osher at UR resides within the School of Professional and Continuing Studies (SPCS). In the summer of 2003, SPCS Senior Associate Dean Pat Brown returned from a professional conference with the idea of an Osher Institute at the University of Richmond. Her initial effort led to communications with the Bernard Osher Foundation and start-up, then annual funding for the Institute in 2004. Once proven to be a viable location for an institute and with the ability to sustain membership and programming, the University of Richmond was granted a one million dollar endowment from the Foundation in 2008. Since that time, the Institute has operated financially by using only the interest on its endowment, complemented by membership and class fees.

For its entire 10 years at the University of Richmond, Osher at UR has offered a vast assortment of classes, activities, and events for its members. Osher members, experts in their own fields and with extremely varied backgrounds, lead many classes. Engaging the community, the Institute also reaches out to local museums, historical sites, government agencies, and businesses for speakers, tours, and special events. Additionally, the Institute has been fortunate to have the support of the university through expert faculty willing to instruct classes and staff providing financial and operational services.

Throughout its history, the Institute has coordinated trips to local, regional, national, and international sites of interest. These range from touring local Civil War battlefields to visiting the latest exhibit at the Virginia Museum of Fine Arts to tracing the lives of American authors in Paris.

Its members have formed interest groups for those who have the same desire to hike, bike, play bridge, read and discuss various types of literature, study and listen to guest lecturers on investments, and attend theater performances.

The Institute also affords its members the opportunity to audit undergraduate credit-bearing university courses at a nominal fee or at no cost, depending on membership level. This benefit allows members to be a part of the university's academic community in a different context—that of an undergraduate student. Providing the university with an intergenerational approach to learning, Osher members have taken classes in many different disciplines, including art, history, languages, literature, psychology, religion, sciences, and sociology.

The University also grants Osher members other benefits. Because they are “students” of the University of Richmond, Osher members have full access to the Boatwright Library holdings and databases. They also may avail themselves of the university's computer help desk and the technology center. Additionally, the university's Modlin Center for the Arts provides Osher members discounted tickets on its performances.

Osher at UR has enjoyed great success in its 10-year tenure, as is evidenced in its long-standing members, the glowing evaluations of its courses and programs, and its strong, continued support from the entire university community.

The Institute's strategic plan seeks to reflect on and blend with the Richmond Promise, which has guided the university for the past seven years. The plan also should blend with the School of Professional and Continuing Studies' mission of "enriching lives and careers."

## **Structure**

The day-to-day operation of the Institute is the responsibility of the Osher Director and Administrative Coordinator. They take the lead for course selections, scheduling, room assignments, registration, fee administration, and special events. They handle all aspects of Osher membership, from accepting fees to entering members into the university's data system to providing ongoing support to members. In addition, they closely interact with key personnel in SPCS and other parts of the University to assure continued strong relationships with UR. The Director is also responsible for the annual budget, for annual reports to the Bernard Osher Foundation regarding the endowment and management of the Institute, and for ongoing relations with the National Resource Center and other Osher Directors. The Director also engages in community outreach and presents to local civic organizations and other groups upon request. Finally, the Director and Administrative Coordinator are present at all Leadership Council meetings, document its proceedings, and work closely with the Council and its various support teams to assure the success of the Institute.

Because the Institute is membership-driven and member-led, members of the Osher Leadership Council also take an active role in shaping the work of the Institute—selecting topics for courses, recruiting instructors, planning trips and gatherings, and leading project teams of Osher members for Curriculum, Development, Leader Support, Marketing, Membership, and the Newsletter.

The Leadership Council serves in an advisory capacity to the Institute and provides guidance for program activities and operations. As representatives of the Institute's membership, the council helps ensure that the Institute realizes its purpose. The council, which meets quarterly, consists of nine members, with the past chair serving as an additional ex officio member. Members of the council serve for a term of three years. Terms of office are staggered with the term of office of three members ending each year and three new members filling their vacancies.

The Leadership Council, in its advisory capacity, is charged with

- Assisting the Institute in maintaining a good relationship with the School of Professional and Continuing Studies and the University of Richmond.
- Helping to develop objectives and short- and long-range program goals and to evaluate the effectiveness of the program against the goals.
- Reviewing program finances.
- Engaging council members in service on at least one team.
- Advocating for the program in the community.
- Participating with council members of other Osher programs at the state and national levels as appropriate.

The team structure is designed to assist the Leadership Council and support the Osher Institute in more specific ways:

- **Curriculum:** Help in finding Osher course leaders and in developing Osher classes
- **Development:** Fundraising for the Osher Institute (in cooperation with UR Advancement)
- **Leader Support:** Provide technical and classroom support to Osher class leaders
- **Marketing:** Promote the Osher Institute to the public and recruit new members
- **Membership:** Provide member services, orientation, and encourage members to renew
- **Newsletter:** Develop Osher Insider feature stories about the Institute and its members as well as aspects of the University

The Leadership Council and the teams provide opportunities for the Osher Institute members to become engaged and contribute to the Institute. Additionally, every member volunteer ensures that Osher at UR thrives and provides programming and activities of interest to its members.

### **Membership Structure**

Osher at UR has enjoyed a high level of membership during its 10-year tenure. It averages approximately 650 members in any given year.

The Institute has three levels of membership:

- **Silver: \$75/year** (rolling 12-month)  
Our **Silver** membership provides a University of Richmond One Card and e-mail address, parking pass, full use of the library including access to online databases while on campus, and access to register for Osher courses. However, **Silver** members pay for each course in which they enroll and pay \$100 to audit available semester-long credit courses.
- **Gold: \$350/year** (rolling 12-month)  
This individual membership includes a University of Richmond One Card and e-mail address, parking pass, full use of the library including access to online databases while on campus, and membership in Friends of Boatwright Memorial Library. In addition, **Gold** members have unlimited access to all Osher courses free of charge (excluding off-campus trips).
- **UR Osher: \$25/year** (rolling 12-month)  
This membership is for UR faculty, staff and retirees who wish to participate in Osher offerings. Like Silver members, UR Osher members pay for each course.

Silver members may upgrade at any time during the first six months of their membership year. Upgrades will not change the membership term dates. When upgrading, the \$75 Silver membership fee will be applied to the upgrade.

### **3. Methodology and Findings**

As noted earlier, the Institute undertook this strategic planning process in 2014 at the direction of the Dean of the School of Professional and Continuing Studies. Several Osher members volunteered to serve on a small team to develop the plan and have given countless hours to this work. The team was co-chaired by the Osher Director, Peggy Watson and another team member. The team members included:

- Bill Bailey, Leadership Council Member, Leader Support Team Member, Osher Instructor
- Bill Bateman, Leadership Council Member, Leader Support Team Member
- David Frimpter, Osher Instructor
- Jamie Lou Hawthorne, Leadership Council Member, Curriculum Team Chair
- George Pangburn, Team Co-Chair, Leadership Council Vice Chair, Newsletter Chair, Osher Instructor

In addition, Debra Guild, Administrative Coordinator of the Institute provided invaluable staff support for this effort.

The planning team first met in June 2014 to begin its work. From that first meeting and the ones that followed, the team identified a four-pronged approach to the development of the plan:

- Data Analysis:** collection and analysis of existing data
- Member Survey:** solicitation and analysis of information about our members not available in existing data
- Synthesis:** streamlining of the results of the data analysis and survey into strategic issues or themes for the plan itself
- Workshop:** hosting of a half-day session with key Osher members to: review the results of the data analysis and survey; participate in breakout sessions on each of the strategic themes to formulate action item; and enhance the sense of ownership in the plan.

## A. Data Analysis

Data were gathered from several sources including Osher membership forms, course registration forms, and Osher course catalogs. The membership data was as of July 3, 2014. Five semesters of course data were included, ending in the summer of 2014. New member orientation and similar classes were excluded from the analysis, as was participation by guests.

Some of the major findings of the data analysis are listed below:

- Characteristics of Osher Members
  - Total membership is 663 (includes those whose membership lapsed in past year).
  - Membership is in a continuous state of flux, with 20-25% leaving and a similar number joining each year.
  - 45% of Silver members have been members for less than one year.
  - Half of new members do not renew their membership.
  - Less than half of today's members were members in 2010.
- Specifics about Gold Members
  - They represent:
    - 24% of Osher membership
    - 34% of those registered for courses
    - 74% of course registrations
    - 50% of fees.
- Details on Class Registrations (5 semesters, Spring 2013 through Summer 2014)
  - Roughly 200 members register for classes each semester.
  - Almost half who registered for classes do so for only one semester.
  - 50 members represented 46% of registrations.



- 100 members represented 86% of registrations.
- Categorization of Members (2013-2014 School Year)
  - The breakdown of the 663 members reflects:
    - 167 did not renew memberships
    - 174 were new members (98 took at least 1 class)
    - 116 were Gold members (107 took classes)
    - 98 Silver members registered for classes
    - 97 Silver members did not take classes
    - 15 were UR members (not new or inactive).
- Details about Osher Classes/Offerings
  - 174 classes/activity were offered during 5 semesters.
  - Of those classes, 55% were offered in the afternoon.
  - 33% had 3 sessions.
  - The most common category of class was history; it represented
    - 27% of classes offered, and
    - 32% of registrations.
  - During this period courses were taught by approximately 100 different leaders/instructors.
    - Roughly half of course leaders are not Osher members.
- Location of Osher members
  - Most Osher members live in an area that is bounded by:
    - I-95 on the east,
    - 288 on the west,
    - 295 on the north
    - and the James River on the south.

## **B. Membership Survey**

The planning team developed a survey questionnaire to acquire basic information about our membership: demographics, education levels, work status, as well as their views about various aspects of Osher at UR. The questions included in the survey were based in part on those of other Osher Institutes and in part on what the team believed were important to our members. The survey was also shared with the Leadership Council before issuance.

More than 750 current and former Osher members were contacted by email in mid-August 2014 to participate in the survey and were sent a link to complete it online. Email reminders were also sent out, and paper copies were made available at the 10th Anniversary Celebration for those who preferred not to respond online. The survey was open for one month. A total of 223 individuals replied to the survey, which represents a 30% response rate.

### **Significant Statistics From the Survey:**

- Demographics and Related
  - 74% of respondents are ages 60-74 (65-69 is the largest component of that group).
  - 92% are white or Caucasian.
  - 64% are female; 36% are male.
  - 68% are married or partnered.

- 51% have graduate or professional degrees; an additional 34% hold Bachelor's degrees.
  - 43% have been Osher members for more than 3 years.
  - 58% are Silver members; 38% are Gold members.
  - 68% are fully retired; 25% work full time or part time.
  - 19% are UR graduates.
  - 85% of respondents are either "very satisfied" or "somewhat satisfied" with their Osher experience.
- Views on the Osher Program
    - 85% are "very satisfied" or "somewhat satisfied" with their Osher experience.
    - The elements of the Osher program identified as most important to satisfaction were:
      - Osher courses
      - Osher staff
      - Access to UR facilities/services.
    - The aspects of Osher classes most important to respondents were:
      - Quality of classroom facilities
      - Value for money
      - Course content.
    - There was a high level of involvement among respondents: 52% both took classes and participated in other Osher activities.
    - The most popular types of classes were (in descending order):
      - History
      - Political science
      - Literature
      - Art
      - Film; Environment and Geography (tie).
    - Most respondents (66%) would like UR faculty more involved in Osher program.
    - More than 30% of respondents contributed to UR in last year (there was no difference in rate of giving between UR alumni and non-alumni).
  - Areas of Concern
    - 60% of respondents indicated that they had never volunteered in any capacity.
    - 46% did not attend any Osher-sponsored events in the past year.
    - 55% took 2 or fewer classes in the last year.
    - The major reason given for not taking classes: course topics offered.
    - There was no clear trend in terms of what could be done to enhance the membership experience.
    - There is a lack of diversity in our membership.

### C. Synthesis

The planning team spent considerable time discussing the results of the Data Analysis and Membership Survey and determining the common threads or themes that emerged from those efforts. As a guiding principle the team sought to strengthen an already strong program to ensure sustainability, which will result in moderate growth in membership through reduced attrition. Based on the results of the Data Analysis and the Survey, the planning team identified five strategic themes that are reflected in the plan:

1. Keep Our Core Membership Participating
2. Attract and Keep New Members
3. Continue to Build and Enhance Existing UR Relationships
4. Increase Inclusion
5. Expand Outreach in the Greater Richmond Area

## **D. Strategic Planning Workshop**

Thirty Osher "leaders" attended a half-day workshop and were briefed by members of the planning team on the Data Analysis and Membership Survey results. Attendees then participated in breakout sessions to discuss the five themes and formulate possible actions to be taken to address them. The results of the breakouts were presented to the entire group for discussion and have been used by the planning team in developing the initiatives described in Section 4 below.

### **4. Strategic Initiatives for Osher at UR**

Building on the work identified in Section 3, the planning team developed a series of initiatives to further the strategic themes for the Institute over the next several years. These initiatives are described below in terms of those to be taken in 2015 and those for 2016 and beyond. This approach will allow the Institute to focus on what we would do next year as our first order of business and to prioritize items for 2016 as we move through 2015. The planning team sought to avoid the tendency in strategic plans to overcommit and under-deliver by only identifying one initiative per theme for 2015. In addition to a description of the initiative, the initiatives include the responsible Lead Teams—Membership, Marketing, Leader Support, etc.—and any outside groups that will work to implement the initiatives.

#### **Theme 1—Keep Our Core Membership Participating**

Generally speaking, the core membership is made up of individuals who have been members for two years or longer. They constitute the great majority of class registrations at Osher at UR and are, for the most part, the source of volunteers, leadership and program stability. Accordingly, a key part of the strategic plan is focused on initiatives to keep those core members as a vibrant part of the program.

##### **Initiatives for 2015**

1. *Maintain/enhance the focus on quality of course content.*

As noted in Section 3. B., content of courses matters. While many people join Osher at UR for reasons other than courses—interest groups, library access, UR discounts, etc.—most join to attend courses. In the membership survey, 80% of respondents indicated that Osher courses were very important to their satisfaction with Osher at UR, the highest component of satisfaction recorded in the survey.

To assure continued satisfaction, we should continue to evaluate instructor effectiveness through review of course evaluation forms. Consider revising the forms to get more input from members on program desires and choices. Some options might include making the

forms anonymous, including more open-ended questions to solicit comments, and deleting the questions about interest in being class assistant/leader.

Review membership survey (in particular, responses to Questions 24 [types of classes to be offered in the future], 32 [how the Institute might enhance the membership experience], and 33[what questions are we not asking]) to identify new course opportunities or other enhancements in the near term that reflect member interests and preferences.

Leads: Osher Staff, Curriculum Team

### **Initiatives for 2016 and beyond**

#### *1. Seek opportunities to encourage greater involvement in volunteer activities.*

In the membership survey, 60% of those who responded to Question 30 indicated that they had never served in a volunteer capacity at Osher at UR. These included leading or facilitating a class, serving as class assistant, member of the Leadership Council, serving on a support team, and contributing to an Osher event or activity. As an organization that depends on volunteers for the strength of its program and offerings, we need to reach out to members in this regard.

As part of their routine meetings, the various support teams should consider ways to broaden the volunteer base. These might include: 1) having Class Assistants make a pitch at the end of every class to consider serving as a volunteer in one or more of our support teams or at upcoming Osher events; 2) consider giving memberships to instructors; or 3) rewarding volunteer instructors with an Osher branded golf-type shirt.

Leads: Osher Staff, Support Teams

#### *2. Foster a sense of community among Osher members by personal contacts, opportunities for social interaction.*

Nearly 75% of respondents to the membership survey considered interaction with Osher members to be either very important or somewhat important. To continue to assure this level of satisfaction, we should develop and provide a list of new Osher members to the Interest Group leaders. In addition we should consider sponsoring more frequent breakfast, lunch, dinner get-togethers at Heilman Dining Hall.

Leads: Osher Staff, Interest Group Leaders

#### *3. Consider providing special benefits/VIP treatment for Gold members.*

Because our Gold members are especially important to program sustainability, we should consider ways to enhance the value of that level of membership. These might include Modlin Center tickets on a first-come, first-served basis, nametags, or other similar benefits.

Leads: Osher Staff, Leadership Council

4. *Conduct a membership survey on a biennial basis to determine where we have made progress and where we need to focus additional effort.*

The 2014 membership survey provides a snapshot in time of our membership. We should plan on performing a similar survey, building on the lessons learned from the 2014 survey, on a biennial basis to monitor our membership demographics, our progress under this plan, and our emerging challenges.

Leads: Osher Staff, Leadership Council, and SPCS Staff

## **Theme 2—Attract and Keep New Members**

Osher at UR needs to attract and keep new members in the program. New members provide new life experiences, insights and interests to keep the program strong. Moreover, as core members move from the area or leave the program for other reasons, new members help maintain a steady state of membership. However, roughly half of new members are members for only one year and there is a subsequent churning in membership. While that figure is not extraordinary compared to other Osher programs, it does reflect an inefficiency that we would like to reduce. The following initiatives are aimed at addressing that inefficiency.

### **Initiatives for 2015**

1. *Increase Communication with New Members.*

One way to help assure that new Osher members remain Osher members is to assure that they feel valued and “plugged-in.” Possible activities to support that might include:

- Welcoming new members to each class
- Creating a buddy system between new members and experienced members
- Following up with new members by post cards/email.

Leads: Osher Staff; Leadership Council; Leader Support Team; Membership Team

### **Initiatives for 2016 and beyond**

1. *Promote Interest Groups to New Members*

Interest groups enhance the Osher at UR experience and provide a sense of additional value to membership in the program. More than 75% percent of respondents to the membership survey classified Osher non-course activities—which are primarily interest groups—as either very important or somewhat important to their satisfaction. We should take steps to assure that new members are aware of the range of interest groups available with membership and what activities the groups support.

Leads: Osher Staff, Leader Support Team, and Membership Team

2. *Offer Incentives to Take Courses*

We should take a systematic look at how we might incentivize taking courses as a way to better retain new members. Some ideas that should be considered include:

- Taking 2 courses, get 1 free (for new members)
- Changing the rate for new Silver members—make it \$100 and toss in 2 courses
- Providing coupons to invite friends
- Having a periodic drawing to win membership.

Leads: Osher Staff, Membership Team, and SPCS Staff

### **Theme 3—Continue to Build New and Enhance Existing UR Relationships**

Osher at UR enjoys an outstanding relationship with the broader UR community in the form of: UR professors and staff who voluntarily teach classes; first-rate classroom availability; technical support to instructors; discounts for the bookstore and various UR functions; access to the UR email system; and use of the Boatwright Library, to name a few. In the membership survey, 65% of respondents indicated that they would welcome having more UR faculty involved in the Osher program. In developing this strategic plan we felt that it is important that Osher should be increasingly supportive of the University. The initiatives that support this theme are listed below.

#### **Initiatives for 2015**

##### *1. Osher Member Support to Various UR Functions*

Develop a plan for Osher volunteers to give back to the University by donating their time: in campus tours, at the Boatwright Library, during class registration, throughout Homecoming weekend, or wherever it would be most beneficial to UR. Include as part of the plan, publishing volunteer opportunities for Osher members to help at UR functions.

Leads: Osher Staff, Marketing Team, SPCS and other appropriate UR Staff/Leadership

#### **Initiatives for 2016 and beyond**

##### *1. Osher Instructors/Experts*

Osher members bring a wide variety of technical, career, and life experiences that could be of value to UR professors and students in class instruction, mentoring and other functions. These include experience or expertise in management, government, education, counseling, marketing, social and physical sciences, arts and literature, to name a few. Develop a list of supportive Osher members and their specific areas of expertise to share with the academic and leadership community of the University as potential resources for lecturing, mentoring or technical support.

Leads: Osher Staff, Leadership Council, SPCS and other appropriate UR Staff and Leadership.

##### *2. Greater Involvement of UR Faculty in Classes*

Building on the expressed interest of members in greater UR faculty involvement in the Osher program, encourage Osher instructors to consider reaching out to academic departments, where appropriate, to see if there is interest in co-leading a particular class topic.

Leads: Osher Staff, Leader Support Team

### 3. *UR-Osher Lecture Series*

Develop a plan, in concert with UR leadership, to have a periodic lecture from faculty or staff on topics of particular interest to them. These could include research interests, current affairs, University-wide issues, etc.

Leads: Osher Staff, Leadership Council, SPCS and UR Faculty and Leadership

### 4. *Promote Greater Auditing of UR Classes*

Only about 18 percent of respondents to the membership survey indicated that they had audited a UR undergraduate for-credit class. The opportunity to attend these classes at nominal cost is a substantial benefit of Osher membership. It is also a benefit to UR faculty who welcome Osher students to audit classes, as witnessed by the opinions of several instructors who have had them in their classes:

*“It is good for the students to see the non-traditional student who is interested in inquiry for inquiry’s sake.”*

*“[The Osher students] seriously remind me why I love teaching in the first place.”*

*“Happy to have our Osher friends join us – they always enrich the experience for my students.”*

Because of the two-way benefit afforded by auditing, the Institute should develop a plan to promote greater auditing of UR classes. This should include such things as assuring that new members are aware of the opportunity (possibly by having a single class on auditing), having an auditing table at Open Houses and similar measures.

Leads: Osher Staff, Curriculum Team, and Marketing Team

### 5. *Osher Table at UR/Public Events*

To assure sustainability of the program, we need to continually look for opportunities to make our story known to potential new members. Accordingly, Osher at UR should work with appropriate UR leadership to identify events where we might set up a table to promote Osher at UR by providing program information, applications, etc.

Leads: Osher staff, Marketing Team, SPCS, and UR Leadership

## **Theme 4—Increase Inclusion**

The analysis of registration data showed that most Osher members live in an area that is west of I-95, south of I-295, east of Route 288 and north of Hull Street, with a heavier concentration in the Zip Codes closest to the UR campus. In addition, the membership survey determined that 92% of respondents are white or Caucasian. The working group believes that expanding our geographic, ethnic and socioeconomic reach could enhance the program by bringing different viewpoints and life experiences to the Osher membership.

### **Initiatives for 2015**

#### *1. Expanded Outreach in the Greater Richmond Area*

Develop and begin implementation of a plan for outreach to enhance the makeup of our membership base through Osher presentations to 55+ communities, professional and social organizations, churches, and community centers. It should focus on areas not currently served by other lifelong learning centers and should include mission-related classes or programs that Osher-UR could start that would increase our inclusion.

Leads: Osher Staff, Marketing Team, Membership Team, and SPCS Leadership

### **Initiatives for 2016 and beyond**

#### *1. Osher Membership as a Gift*

Identify ways we might expand our inclusion through gifts of Osher memberships. This might include newspaper or Internet ads at appropriate gift-giving times or having the Institute give gift memberships to retiring UR faculty and staff.

Leads: Osher staff, Marketing Team

## **Theme 5—Expand Osher Outreach in the Greater Richmond Area**

Osher at UR already leverages its position as the unique provider of lifelong learning in an academic setting in the Richmond area. Examples include its partnership with the Rose Group in support of China Fest, its relationship with the Virginia Museum of Fine Arts, the Virginia Historical Society and the Civil War Roundtable. We believe that continuation and expansion of this outreach through the following initiatives will provide for a more robust and intellectually stimulating program for Osher members at the University of Richmond.

### **Initiatives for 2015**

#### *1. Expand our partnerships to include new and diverse outside entities, such as the American Revolution Roundtable, major Richmond area health care providers, New Virginians, and others*

Leads: Osher staff, Leadership Council, Marketing Team

## **5. Summary**



The Osher Institute's strategic planning process has provided a great deal of data, ideas, and next steps. The engagement of members in this process has been gratifying and signifies that they care very much about this Institute and its long-term sustainability and well being.

The planning team realized early on in this process that the work could not end with a written report. Rather than filing this report, the Osher Institute Leadership Council and the Institute's members must move forward to engage in new and exciting initiatives, to address those issues that cause concern with appropriate actions, and to continue to review and monitor progress of these initiatives and actions.

While this report identifies action steps for this year and beyond, the Leadership Council will review the work in earnest at regular intervals. Are we measuring up? Are goals being met? Are we doing the right things and are we doing them well? There is a need for continuous review and for the ability to modify the plan as the Institute moves forward.

To ensure that the Osher Institute continues to thrive, the Leadership Council will also consider regular review of membership and class enrollment data, as well as a membership survey every two years. It may also consider a special council meeting each year to review the planning initiatives and adjust as needed. Also contemplated was an annual membership meeting for all Osher Institute members. Much like the focus group for the strategic planning effort, this meeting could provide an opportunity for input and feedback on programming and could also be a forum for new creative ideas for the Institute to consider.

While Osher at UR is indeed a thriving community of engaged and interested members, this strategic planning process serves as a vehicle to ensure that the Institute can sustain its current good work and possibly grow to offer even greater opportunities for its members in the future.

## **Appendices**

**A. Osher Class Data**

**B. Focus Group Membership**



## A. Osher Class Data

### Osher Classes by Type, Spring 2013 through Summer 2014

|                               | Number of Courses | Registrations | Registrations Per Course |
|-------------------------------|-------------------|---------------|--------------------------|
| Geography                     | 7                 | 280           | 40.0                     |
| World Affairs                 | 2                 | 73            | 36.5                     |
| Finance/Economics             | 3                 | 100           | 33.3                     |
| Science                       | 4                 | 118           | 29.5                     |
| Film                          | 4                 | 117           | 29.3                     |
| History                       | 47                | 1,355         | 28.8                     |
| Music                         | 9                 | 251           | 27.9                     |
| Political Science             | 13                | 333           | 25.6                     |
| Health                        | 6                 | 155           | 25.8                     |
| Religion                      | 4                 | 93            | 23.3                     |
| Literature                    | 16                | 332           | 20.8                     |
| Art                           | 6                 | 123           | 20.5                     |
| Interdisciplinary             | 19                | 375           | 19.7                     |
| Nature                        | 7                 | 136           | 19.4                     |
| Computers & Technology        | 4                 | 74            | 18.5                     |
| Drama                         | 6                 | 90            | 15.0                     |
| Food                          | 2                 | 22            | 11.0                     |
| Self Improvement              | 13                | 132           | 10.2                     |
| Hobby                         | 2                 | 12            | 6.0                      |
| <b>All Courses/Activities</b> | <b>174</b>        | <b>4,171</b>  | <b>24.0</b>              |



## B. Focus Group Membership

| <b>Leadership Council with Term Year</b>  | <b>Last</b>               | <b>First</b>     | <b>Attended</b> |
|---|---------------------------|------------------|-----------------|
| <b>Council 2015, Chair; 10<sup>th</sup> Anniversary, Chair; Ex officio on all teams</b> | <b>De Leo<sup>+</sup></b> | <b>Sheryl</b>    | X               |
| Council 2016, Vice Chair  | Pangburn <sup>+</sup>     | George           | X               |
| Council 2014, Past Council Chair  | Williams* <sup>+</sup>    | Ann              |                 |
|   |                           |                  |                 |
| Council 2014  | Bateman                   | Bill             | X               |
| Council 2014  | Koch                      | Lin              |                 |
| Council 2015  | Bailey                    | Bill             |                 |
| Council 2015  | Hawthorne                 | Jamie Lou        | X               |
| Council 2015  | Huffstetler               | Anne             | X               |
| Council 2016  | Owens                     | David            | X               |
| Council 2016  | Woody                     | Landon           | X               |
|   |                           |                  |                 |
| * Indicates Past Council Chair  |                           |                  |                 |
| + Indicates Executive Committee   |                           |                  |                 |
|   |                           |                  |                 |
| <b>CURRICULUM</b>   |                           |                  |                 |
| <b>Curriculum, Chair 2014</b>   | <b>Hawthorne**</b>        | <b>Jamie Lou</b> |                 |
| Curriculum 2015   | Begley                    | Dan              |                 |
| Curriculum 2015   | Brickman                  | Polly            | X               |
| Curriculum 2015   | Hill                      | Melissa          |                 |
| Curriculum 2015   | Hollands                  | Richard          |                 |
| Curriculum 2015   | Hubbard                   | Carole           |                 |
| Curriculum 2015   | Purcell                   | Riker            | X               |
| Curriculum 2015   | Smith                     | Sheryl           |                 |
| Curriculum 2014   | Warner                    | Don              |                 |
|   |                           |                  |                 |
| ** Indicates Current Leadership Council Member  |                           |                  |                 |
|   |                           |                  |                 |
| <b>DEVELOPMENT</b>  |                           |                  |                 |
| <b>Development, Chair</b>   | <b>Booberg*</b>           | <b>Carl</b>      | X               |
| Development   | Ervine                    | Marshall         |                 |
| Development   | Jarett                    | Carol            |                 |
| Development   | Murray                    | Janet            |                 |
|   |                           |                  |                 |
| <b>LEADER SUPPORT</b>   |                           |                  |                 |

|                                      |                      |               |   |
|--------------------------------------|----------------------|---------------|---|
| <b>Leader Support, Chair</b>         | <b>Pangburn</b>      | <b>Pam</b>    | X |
| Leader Support                       | Bailey**             | Bill          |   |
| Leader Support                       | Bateman**            | Bill          |   |
| Leader Support                       | Hill                 | Melissa       |   |
| Leader Support                       | Kidd                 | Larry         | X |
| Leader Support                       | Williams*            | Tim           | X |
|                                      |                      |               |   |
| <b>MARKETING</b>                     |                      |               |   |
| <b>Marketing, Chair</b>              | <b>Huffstetler**</b> | <b>Anne</b>   |   |
| Marketing                            | Beck                 | Bev           |   |
| Marketing (for speaking engagements) | Booberg*             | Carl          |   |
| Marketing                            | Bourgeois            | Linda         | X |
| Marketing                            | Curotto              | Mary          |   |
| Marketing (for speaking engagements) | Ervine               | Marshall      |   |
| Marketing                            | Hanger               | Tim           | X |
| Marketing                            | Knically             | Donna         |   |
| Marketing                            | Moser                | Nancy         | X |
| Marketing                            | Pawelski             | Bill          |   |
| Marketing                            | Pickering            | Lee Ann       | X |
| Marketing                            | Whit                 | Nanette       |   |
|                                      |                      |               |   |
| <b>MEMBERSHIP</b>                    |                      |               |   |
| <b>Membership, Chair 2015</b>        | <b>Woody**</b>       | <b>Landon</b> |   |
| Membership 2016                      | Blevins              | Ruth          |   |
| Membership 2014                      | Draben               | Carolyn       |   |
| Membership 2014                      | Earl                 | Rita          |   |
| Membership 2016                      | Hamlett              | Karen         |   |
| Membership 2015                      | Heland               | Ken           |   |
| Membership 2015                      | Hill                 | Melissa       |   |
| Membership 2015                      | Koch**               | Lin           |   |
| Membership 2014                      | McNeil               | Joyce         |   |
| Membership 2016                      | Owens**              | David         |   |
| Membership 2015                      | Vick                 | Linda         |   |
| Membership 2014                      | Williams*+           | Ann           |   |
| Membership 2014                      | Wood                 | Sally         |   |
|                                      |                      |               |   |
| <b>NEWSLETTER</b>                    |                      |               |   |
| Newsletter, Chair                    | Pangburn**           | George        |   |
| Newsletter                           | Cuthbert             | Beth          | X |
| Newsletter                           | Koch                 | Mike          | X |
|                                      |                      |               |   |
| <b>INTEREST GROUP CHAIRS</b>         |                      |               |   |

|                                |             |         |   |
|--------------------------------|-------------|---------|---|
| IG Bicycling                   | Votta       | John    |   |
| IG Bridge                      | Hollands    | Ellen   | X |
| IG Great Conversations         | Warner      | Don     |   |
| IG Hikers                      | Myers       | Floyd   |   |
| IG Investments                 | Huffstetler | Charlie |   |
| IG Literary Dreamers           | Ventura     | Linda   | X |
| IG Mystery Lovers              | Heland      | Ken     | X |
| IG Theatre Lovers              | Turner      | Linda   | X |
|                                |             |         |   |
| Data Collection and Analysis   | Frimpter    | David   | X |
| Class Assistant Representative | Seward      | Bill    |   |
|                                |             |         |   |
| <b>STAFF</b>                   |             |         |   |
| Osher Admin. Coordinator       | Guild       | Debra   | X |
| Osher Director                 | Watson      | Peggy   | X |
| Sr. Assoc. Dean SPCS           | Brown       | Dr. Pat | X |
|                                |             |         |   |