



End of Year 2016 Strategic Plan Accomplishments

Theme 1—Keep Our Core Membership Participating

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.

We have had great volunteer support throughout 2016, and we acknowledge them in our fall back-to-school event by thanking them publicly and by posting names of our volunteers. We have also solicited new work team members at this event and had quite a few sign-ups. We solicit class assistants with each course confirmation and have had more members step up and serve in this role. Our recently-completed membership survey indicates that about 45% of our members are interested in serving in some form of volunteering for the Osher program. We have also had individual members offer help in very specific ways, including data analysis, financial/budgeting guidance, membership survey, and classroom AV documentation.

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.

Through one-on-one interaction and through multiple orientation sessions, we have encouraged all new members to join our interest groups. The hikers and theatre groups especially experienced growth this past year. The theatre interest group generally invites its members to join together for a meal before/after each performance. We have continued to offer classes that include dinner or breakfast, and we've offered two classes each semester at our Institute for Culinary Arts, which include a meal and time for social interaction.

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.

We have increased course offerings by 100% over the last two years, which is particularly attractive to our Gold members thanks to our fee structure that allows these members to take unlimited classes each semester. We continue to research ways to enhance our Gold level membership benefits.

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.

We have just completed our 2016 survey as of October 31, 2016. Data analysis has been completed. In the next few weeks, we will report our findings within the School of Professional and Continuing Studies, as well as to our Leadership Council and to our membership.

Theme 2—Attract and Keep New Members

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.

As noted in Theme 1, Initiative 2, we have promoted our interest groups as a means of becoming involved.

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.

Our financial expert Osher member reviewed our membership levels and calculated the financial implications of changing our membership rates and benefits. We believe that our current levels are working well for us, as evidenced by a near 16% increase in membership over the past two years. We continue to emphasize the many free courses/lectures we offer each semester and encourage new members to attend. We also note that members enjoy the benefit of bringing a friend to one class per year as a means of enticing potential new members.

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

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.

We have not created a list or database of our members' expertise to offer across campus. However, we do have individual Osher members who serve as mentors to undergrads, especially in the Business School. We can continue to research the best, most useful information to solicit and share.

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.

We continually reach out to current and retired UR faculty and staff to teach for the Osher Institute. Many of those individuals have found the experience to be a rewarding one and have returned to teach Osher classes year after year. Our appeals have increased the number of courses taught by faculty and staff.

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.

We have suggestions for potential speakers, and we have discussed hosting campus-wide lectures. We do market some of our better-known speakers across campus and to the community. For example, the Osher Institute is a partner of ChinaFest, an annual greater Richmond event. As such, we market and support this series of events, especially the opening lecture by a renowned China expert.

We also very successfully offered the live-streamed National Endowment for the Humanities (NEH) Jefferson Lecture in the Humanities on May 9, 2016, which featured Ken Burns. We had more than 60 Osher members and friends attend this special event.

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.

We have continued to promote audit opportunities to our members through our web site and our catalog of courses each semester. We also promote the ability to audit at each of our orientation classes.

Theme 4—Increase Inclusion

1. 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.

During the past year, we have staffed tables and exhibits at university sporting events, performing arts events, community art shows, and farmers' markets. We follow up via email with each person who completes an interest form at the event and encourage membership.

2. 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.

We have promoted Osher membership as a gift idea by including this as an article in our catalogs. We have also promoted this in the university-wide daily email announcements, Spiderbytes.

Theme 5—Expand Osher Outreach in the Greater Richmond Area

We continue to reach out to the greater Richmond community as a means of increasing membership and soliciting new instructors. We continue to make presentations to civic and community organizations, and we have created partnerships with organizations where there is a potential for cross-pollination of members (i.e., Virginia Museum, American Revolution Round Table-Richmond, Valentine Museum).

We have also offered a series of courses that address diversity/inclusion as a means of reaching out to new and different populations. Thanks to the efforts of the University of Richmond's Office of Common Ground and the Virginia Center for Inclusive Communities, this series focused on better understanding and communicating across the lines of difference.