

# The Osher Institute for Lifelong Learning

## Strategic Plan

Amendments June 2, 2018

Amendments December 5, 2018

### 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 2018

##### 1. Enhanced Communication with Members

- All Member Meeting January 2018—The second annual all member meeting was held and information was delivered on our growth study which recommends capping membership at 1200, classes at 100 per semester and the need for increased staff (one additional part time staff has been hired). We also informed members about our grant projects, progress made on the strategic plan and online registration. Members were informed about Osher's multiple volunteer opportunities and interest groups with encouragement to participate.
- This Every Member meeting will continue as an annual affair and one is scheduled for January 10, 2019.
- Membership Survey for 2018— A revised all member survey is currently being prepared with input from Leadership Council and Osher Staff to be distributed to members in September, 2018.
- The Membership Survey was completed on 10-31/18, and its results and subsequent recommendations will be presented to the Leadership Council on 12-5-18 and at the All Member meeting on 1-10-19.
- In order to be more transparent in our communication with members and among Leadership Council members, a revision of our Leadership Council structure, including member expectations and the nomination process, was completed.

Leads: Osher Staff, Leadership Council

## **2. Continued Implementation of Aging Well Series, funded by Regirer Foundation**

- We have continued to seek and offer courses to our members on aging well and these will continue to be especially indicated in our catalogues. Two special speakers were brought in this Spring. Deborah Davis speaking on The Future of Healthcare and Dr. Bill Thomas on Ageism. Both were well received and well attended. We will reapply in June for a new Regirer grant.
- We submitted a new grant proposal in June, 2018 for a two-year Regirer grant. We hope to hear news in December.

Leads: Osher Staff, Leadership Council

## **3. Continued Fund-Raising/Outreach to Members**

- In 2017 we exceeded our goal of raising \$10,000 toward continuing the excellence of our Osher programing with 100% Leadership Council participation. The plans for 2018, which are now in progress, include a similar outreach campaign to members and the re-organization of the Osher Development Team.
- In 2018 we again exceeded our goal of raising \$15,000 toward continued program excellence with 100% participation by Leadership Council. Application has been made for a third year Capacity Building Grant.

Leads: Osher Staff, SPCS Staff, Leadership Council

## **4. Review of Osher Finance and Course Fee Structure Committee**

- An ad hoc committee was formed, met and reported on a review of our budget and fee structures in order to make informed financial decisions as we grow. The recommendations were not to raise fees at this time, be proactive in accounting of our use of UR staff and facilities and to document ways Osher contributes back to the University.

Leads: Osher Staff, Leadership Council

- ## **5. Online Course Evaluations-**
- The Curriculum Team has implemented an online course evaluation. To date this seems to be generating increased returns, more helpful comments, and is liked by members.

Leads: Osher Staff, Leadership Council

## 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 2018

#### 1. Increased Travel Opportunities

Our most recent survey of members showed that 75% would like to travel more through Osher. In response, the Travel Interest Group has been very active providing greatly increased opportunities which have been well received and attended.

Leads: Osher staff, Travel Interest Group

#### 2. Increased Social Activities

- A group of interested members under the leadership of the Membership team have planned social activities to further member engagement Activities have included:
  - Happy Hours at the Cellar (10-3-18, 11-13-18) and Football Tailgate (10-6-18)

Leads: Osher Staff, Leadership Council, Membership Team

## 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 2018

#### 1. Volunteer “Give Back” Program

A new program is being started to increase our give back to the University project. Members will be surveyed to determine their skills and interest and opportunities to use those skills will be identified and then matched within the UR community. This project is in the planning process and will be begun when ready on a pilot basis with SPCS and The Bonner Center. The short term UR giveback volunteer program is also expanding with more volunteers serving SPCS and Osher as Ushers and the Alumni Office for Reunion Weekend. More opportunities for this involvement will also be sought out.

- An Osher class titled “Give To Live “was presented to interested members to explain the new initiative (9-20-18)
- A second class is planned (1-30-18)

Leads: Osher Staff, Leadership Council

## 2. Formation of new Audio/Visual Group

A new group of volunteers are being assembled and trained to assist instructors with the technical set up for their classes.

Leads: Osher Staff, Leadership Council

## 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.

## 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 American Revolution Round Table – Richmond. 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 2018

#### Expanded Marketing Efforts

- Our Marketing Team has expanded the boundaries of outreach to the greater Richmond area by staffing Osher information tables at Farmer's markets in new areas and at city wide events such as Earth Day and retired teacher's conventions.

Leads: Osher Staff, Leadership Council, Marketing Team