End of Year 2017 Strategic Plan Accomplishments

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 2017

1. Online Registration Software Implementation

The planned fall 2017 implementation of a new online registration system will enhance members’ experience in joining Osher, renewing membership, and registering for courses. The streamlined ability to handle all these functions within one system from a home computer will allow students to manage their Osher-related data far more easily. The initial roll-out of the software will include voluntary training sessions for members.

Leads: Osher Staff, SPCS Staff

September, 2017 Work to Date
The Osher Institute launched the “Enrole” software by Entrinsik on August 15 at 9am. Six training sessions were scheduled across two days to assist members in logging on for the first time. The sessions were well attended, but other members were able to complete their profile and register for classes from home. The overall roll out was successful, with the few issues that came up being resolved as quickly and seamlessly as possible. Osher members continue to be helped by Osher staff as needed in use of the new online registration system.

December, 2017 Addendum
The initial statistics on the use of the online registration system are good. Approximately 84% of Osher members were able to create profiles and register for classes, often with initial assistance from the Osher staff. The remaining 16% of memberships and registrations were manually entered by Osher and/or SPCS staff. The spring semester registration will open on December 12, and again, the staff will be prepared to assist members who come to the office for help.

2. Fund-Raising/Outreach to Members

To ensure sustainability and long-term well-being of the Osher Institute and to address an Osher “capacity-building” grant, 2017 work will include an increased focus on contributing financially to the Osher Institute. A case statement of approximately three “reasons to give” will be used to encourage members to give. These may include creating a gathering space for Osher members, having a van/bus contract strictly for Osher use, and planning and supporting a lecture series on topics pertinent to Osher members.
Leads: Osher Staff, SPCS Staff, Leadership Council

September, 2017 Work to Date
The Osher Institute hired a part-time staff member to address fund-raising. After considerable research and discussions with Osher members and Advancement staff, the institute launched an annual fund campaign, rather than creating three “reasons to give.” The first appeal went in letter form to 778 Osher members in mid-August, followed by an email to members on August 31. To date, the campaign has raised $8,630 of the goal of $10,000.

December 2017 Addendum
The Osher Institute met the Osher Capacity-Building grant requirements before the required deadline of December 31, 2017. The Foundation allowed an early report and request for renewal, which was sent in late November. If renewed early, the grant activities would be continuous and span from 2017 through 2018.

Calendar Year 2017 YTD as of October 31, 2017

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* Three corporate gifts – two of these three were matching gifts

3. Enhanced Communication with Members

Keeping members informed is critical to keeping members engaged. Continued and new lines of communication are planned for 2017. Already, the “all member” meeting in January was successful in bringing members up to date on our membership survey results, new grant awards, the online registration software, while also kicking off the spring semester. Continued and increased email blasts on upcoming events and opportunities will also lead to greater communication with members.

Leads: Osher Staff, Leadership Council

September, 2017 Work to Date
The Osher Institute hosted its first “all member” meeting in January 2017 as a means of communicating with its members. The Dean of the School welcomed the 100+ Osher members, and Leadership Council members and the Osher staff provided updates on the Strategic Plan, reported on the 2016 Membership Survey, informed members of the two grant awards, and gave a status report on the implementation of the online registration system.

December, 2017 Addendum
The second “all member” meeting will be January 10, 2018. The Leadership Council and staff will provide updates on current and future activities of the institute.
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 2017**

1. **Osher Volunteers for UR Events**

Members have expressed the desire to give back to the University and show appreciation for the great support it provides to the Osher Institute. Giving time is one way to say thank you. Already, partnerships with SPCS and the Alumni Office are in place and will offer opportunities for Osher members to volunteer their time. Activities include, but are not limited to staffing a table at a Wellness Fair, handing out packets during Alumni Weekend, and ushering for SPCS Night and SPCS graduation.

Leads: Osher Staff, Leadership Council, Marketing Team

*September, 2017 Work to Date*

_The Osher Institute’s Marketing Team members have volunteered at UR events throughout the year, including Alumni Weekend, SPCS Night, the UR Wellness Fair, and other events. Osher members will seek out ways to volunteer across campus and will continue to assist as requested. Additionally, the team has updated the volunteer list to ensure that all are still willing to assist when asked._

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 2017**

1. **Continued Focus on Diversity**

Continue to address diversity within the Osher Institute through programming that focuses on issues of inclusion, diversity, various cultures, and socio-economic differences. Ideas include, but are not limited to offering a National Endowment for the Humanities film series on Civil Rights.

Leads: Osher Staff, Osher Instructors

*September, 2017 Work to Date*

_The Leadership Council and Osher staff continue to explore ways to increase diversity_
and inclusion within the institute, including growing a more diverse membership and offering classes that increase awareness of the differences in various cultures, races, and socio-economic statuses. Council members have met with UR staff members to discuss these issues and ways to address them. Additionally, the Curriculum Team has reviewed topics and identified possible speakers to address these topics.