



UNIVERSITY of
SOUTH FLORIDA
Osher Lifelong Learning Institute

STRATEGIC PLAN

FY 2021-2025

Prepared by:
OLLI-USF Strategic & Operational Planning Committee

May 8, 2020

NOTE: Fiscal year 2021 runs from July 1, 2020 thru June 30, 2021.

OLLI-USF STRATEGIC PLAN FY 2021-2025

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PURPOSE OF THIS DOCUMENT

OLLI-USF has a long-established Strategic and Operational Planning Committee whose function is to help the organization realize its mission and vision. This document has been created with the support and input of OLLI's Staff, Board of Advisors, and Committees to establish a set of goals and directions which will provide planning and continuity for the organization.

This document is divided into two sections:

1. ABOUT OLLI:

Background information about OLLI including history, organizational structure and key data on the current status of our membership and finances.

2. STRATEGIC PLAN:

An overview of OLLI's mission and the current strategic initiatives on which OLLI is focusing.

A related Excel workbook, Operational Monitoring Reports, will be used to collect and track the on-going actions that the staff, board and committees are taking to implement the goals of this plan.

ABOUT OLLI

Introduction

The Osher Lifelong Learning Institute at the University of South Florida (OLLI-USF) is a learning community for 50+ adults offering classes in the arts and sciences, computer training, and technology education. We also conduct special events and provide opportunities for social interaction. Our members continue to learn and teach, to reach out to the community and to be of service to others because we take joy in learning and have much to offer at this stage in our lives.

Due to the coronavirus, OLLI-USF is shifting to online learning exclusively in the short term, and likely in the medium term. The updates to this plan reflect the new approach and details strategies for maximizing OLLI-USF effectiveness during this difficult period.

History of OLLI at USF

OLLI-USF was originally established in 1993 as the USF Division of Senior Programs with its constituent programs, SeniorNet and the Learning in Retirement Institute. In 2005, after receiving the first of several gifts from The Bernard Osher Foundation (www.osherfoundation.org), based in San Francisco, the programs were consolidated and changed to the Osher Lifelong Learning Institute at USF. OLLI-USF is a unit of USF Innovative Education in the USF Office of Corporate Training and Professional Education.

What OLLI Offers Members

We believe that OLLI members possess wisdom derived from experience; therefore, members are OLLI-USF's best resources for leading, teaching and planning. OLLI-USF offers a variety of courses and lectures available to anyone regardless of prior educational attainment. Courses led primarily by 50+ adult teachers on a volunteer basis, are given in technology training and a wide range of liberal arts disciplines. The courses are not for credit and are not graded. In addition, a number of "shared interest groups" provide a platform for members to gather and share and enjoy common experience and expertise. Lastly, OLLI partners in offering domestic and international travel which provide additional educational opportunities.

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How OLLI is Organized

Director & Staff

The OLLI-USF Director and staff have the primary responsibility for overall day-to-day operations and on-going activities. They are accountable for ensuring that OLLI meets its programming and financial goals.

Board of Advisors

The Board of Advisors works closely with the Director to ensure the organization's effectiveness and continuity by representing the interests of OLLI members.

Members

We recognize that members' interests come first in this organization, and we strive to address and meet members' needs and provide excellent opportunities and service to everyone connected to OLLI-USF.

Partners

OLLI forms partnerships with outside organizations both short-term and long-term to help achieve our mission more effectively.

OLLI-USF's Geographic Footprint

Due to the change in our short-term strategy to online learning, OLLI-USF's geographic footprint is expanding. We can now service surrounding counties outside of Hillsborough County and also have remote members in other parts of the country who have ties to our area.

The number of residents in USF's service area reaching 50 is on the rise. Research shows that as people near retirement or retire they have the leisure time to involve themselves in experiences different from their former working careers. OLLI-USF responds to this group primarily by offering classes in a wide variety of academic and non-academic topics, a lecture series, shared interest groups, day trips, domestic/international travel, volunteer opportunities and social activities. Technology training, history, the humanities, arts, literature, writing, political science, science, and nature are all taught by volunteer instructors Monday through Saturday. With over thirty sites presently available for these activities and with competitive pricing, OLLI continues to successfully compete with other recreational opportunities available to the 50+ community.

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Key Data

Financial

	FY 17 Actual	FY 18 Actual	FY 19 Actual	FY 20 (Projected)	FY 21 (Projected)
Membership Revenue	\$94,825	\$86,840	\$89,730	\$78,235	\$52,000
Program Revenue	\$127,908	\$174,171	\$181,134	\$123,205	\$103,958
Fundraising	\$34,780	\$35,836	\$54,702	\$50,462	\$35,000
Endowment	\$111,200	\$112,641	\$120,412	\$124,133	\$100,000
All Other	\$5,454	\$6,272	\$2,336	\$2,525	\$2,700
Total Revenue	\$374,167	\$415,760	\$448,314	\$383,560	\$293,658
Total Expenses	\$421,409	\$409,487	\$423,395	\$376,334	\$381,885
Surplus (Deficit)	-\$47,242	\$6,273	\$24,919	\$7,225	-\$88,227

Benchmarks/Measures for Success

As of this writing, the FY 21 budget is in a preliminary state and the true status of revenue and expenses for FY 21 is not yet clear. Once there is clear data available for FY21, likely in the Fall of 2020, benchmarks will be established.

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Note: This profile may change as we become more of an online organization.

Profile of an OLLI-USF Member

(Based on the 2018-member survey - 371 respondents)

More likely to be female

71% female, 29% male

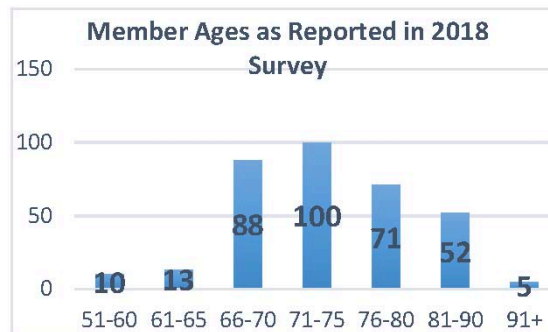
Age 66 – 75

55% of survey respondents are in this age range

3% are 60 or younger

22% are age 76-80

17% of our members are 81+



White/Caucasian

90% of survey respondents self-report as "white/Caucasian"

7% identify as non-white

3% are Hispanic/Latino/Spanish

3% are African-American/Black

1% Asian

Highly educated for their generational cohort

55% have a graduate degree (Master's degree or higher)

19% have less than a bachelor's degree

Live comfortably

75% exceed the median household income for Hillsborough County in 2017 (\$53,742)

6% have less than \$25,000 in household income

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14% have more than \$150,000 household income

82% of respondents have renewed their membership at least once

18% have been members 10+ years

18% were in their first year as OLLI members

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Primarily seeks Intellectual Stimulation

37% say this is the most important benefit of being a member

22% say acquiring new skills is most important

20% participate primarily for “enjoyment, fun” and/or for social interaction

9% value most the ability to explore ideas with their peers

Lives an active and involved life

20% indicated “other interests and activities” kept them from greater participation

Proximity to venues is important

19% considered this their most important limitation to participation

Consider the program affordable – and largely available to them

23% thought that program costs were the ***least important*** limitation

19% found that classes they wanted to take were full

Uses technology

use a desktop computer 55%

use a laptop 61%

use an Apple iPhone or iPad 61%

use an Android smartphone or tablet 39%

53% first heard about us through a friend or family member

20% heard of OLLI through the media (print ads, feature stories, radio spots)

Generally, extremely satisfied with the Institute overall

86% rated their satisfaction 8+ on a 10-point scale

STRATEGIC PLAN

OLLI-USF has a solid foundation, a track record of consistent growth and a history of effective operation.

Vision

Our vision is to be a world-class learning community, accessible to and meeting the needs of a diverse and growing population of 50+ adults.

Values

- Encouraging and supporting lifelong intellectual stimulation and growth
- Providing opportunities for meaningful social engagement
- Harnessing the energy of members to “give back” via volunteer activities
- Promoting physical activity and well-being
- Supporting creative expression and application of life experience from our members for the benefit of others
- Encouraging diversity in our membership

Mission

Our mission at OLLI-USF is to provide intellectual stimulation, social interaction, service opportunities, and outreach to the university and to the greater community.

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OLLI's Strengths, Weaknesses, Opportunities and Threats **(SWOT Analysis)**

OLLI-USF has many strengths, weaknesses, opportunities, and threats that can lead to a direction for growth.

Strengths

- Members and their relationships— social interaction in the online environment.
- Experienced staff
- Diversity of course offerings
- Diverse knowledge
- Experience of volunteers
- Less dependency on dedicated meeting and classroom space and associated audiovisual technology.

Weaknesses

- Aging membership
- Communication throughout the organization
- Public awareness is low
- Lack of videoconferencing skills and related available technology (webcams, etc.) for instructors.
- Lack of technical skills among our members.
- Members willing to take key leadership roles.
- Lack of diversity in our membership.

Opportunities

- Increase our geographic footprint through distance learning.
- Attract more local retirees as members including those who are homebound and those who are snowbirds.
- Investigate greater relationship with USF alumni and retired faculty
- Encourage members to take more classes – no traffic or parking issues and geographic proximity is no longer an issue.
- Make greater use of technology including videoconferencing technology.
- Increase OLLI marketing beyond Tampa Bay.
- Take advantage of growth in the greater Tampa area.
- Develop a superior distance learning capability and be the best among local OLLIs.
- Joint efforts with other partners including local OLLIs.
- Ability to monetize online content

Threats

- Changing technology
- Need for more “in-house” technical expertise
- Potential changes in key staff
- Volunteer burnout.
- Not enough recognition for instructors and volunteers.
- Loss of instructors who can’t adapt to new technology.
- Some members will not renew because they can’t adapt to online learning.
- Reduced number of classes and associated loss of revenue.
- Competition with other online sources that may be free or have nominal cost.
- Competition with other OLLI’s for members and classes due to wide use of distance learning.
- Rapidly changing nature of volunteer opportunities.
- Lack of visibility into the future environment when the virus threat ends.
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The OLLI-USF Advisory Board SWOT analysis was reviewed and updated in May of 2020.

Current Strategic Initiatives

The first three initiatives in the current strategic plan were discussed by the Board of Advisors at the annual off-site meeting in May 2019. The next two initiatives were added in August 2019. An additional initiative was added in May of 2020 to reflect the current move to online learning. These initiatives are designed to build on our successes by focusing on those areas that are of critical importance over the next three to five years:

Maintain and Eventually Increase Membership From Current Levels

OLLI is a member-driven organization. Given the demographics of our membership we experience a loss of approximately one-third of our members each year. As a result, we will focus on the following during the plan period:

Increase awareness of OLLI opportunities.

Replace members lost through attrition by attracting new members who can adapt to the new technology.

Encourage diversity in our membership through committee initiatives.

Encourage volunteerism within OLLI among our membership to encourage long term members.

Increase overall OLLI membership year-over-year aided by new strategies for the online environment.

Promote Shared Interest Groups (SIGs) as a way of developing online communities that promote social interaction and increase membership.

Succession Planning

Support Succession Planning (Staff)

There are several key people who are critical to the on-going operation of OLLI. It is always possible that there will be turnover in a key position and we need to be prepared for change at any time. We anticipate that two key members (and possibly others) of our organization may potentially retire in the next several years which increases the importance of succession planning.

Understand how the search for replacements will take place.

Plan for appropriate Board of Advisors input in the search/decision process.

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Encourage Succession Planning (Board and Committees)

Work with the board and committees on ways to develop new members and plan for leadership turnover.

Stress the importance of looking for new board and committee members.

Assist the committees in preparing a "wish list" of characteristics for committee members.

Help committees to identify potential replacement leaders in advance of the need.

Develop new training and mentoring approaches to foster the development of members with leadership potential.

Support Site Development

A critical element of OLLI's operation is having appropriate venues for holding classes. Space in our operating area is limited. While we currently have adequate space to meet our needs, there is always the risk of losing access to any venue. For all these reasons a key initiative is:

Identify the most effective venues and develop strategies for maintaining access to them including necessary payments to keep them available even when not used.

Prepare for the time when we don't need to be online only.

In the current environment, our instructors function as "sites" and need to be supported with training, technical support and technology to ensure their success.

Document the characteristics of venues that can best meet our needs (location, size, availability, parking, cost, etc.)

Transition from Staff to Member-Based Program Planning Function

Work with the current program planning staff as they develop a member-based approach.

Define procedures and key activities in the program planning process.

Develop a new program planning committee and identify staff.

Train committee on procedures and manage the transition of responsibilities.

Explore different timing for OLLI classes.

Develop an OLLI Data Warehouse to Improve the use of data for Staff and Members

Build a comprehensive facility which houses the data that anyone associated with OLLI needs, and create a series of standardized applications to access and use that data more effectively than is currently possible.

Document current needs and processes.

Prioritize targets for development of staff-oriented and committee-oriented applications.

Develop a plan for building and implementing new systems and implement that plan.

Aggressively staff the Data Warehouse team during the coming fiscal year.

Put new applications in production.

Develop A Superior Online Learning Capability

Build an online learning capability that is the best in the area to retain current members and attract new members.

Develop new classes targeted towards online learning, including blended offerings and those that encourage socialization.

Develop online content that can be monetized for additional revenue.

Develop instructor capabilities in the online space and document best practices.

Train members to use online tools.

Partner with other organizations including OLLIs for online offerings.