

## **OLLI at UNC Asheville Strategic Plan 2017-2022 New Chapters for Innovation and Engagement**

OLLI at UNC Asheville (OLLI), founded in 1988 as the NC Center for Creative Retirement, offers innovative learning and engagement opportunities for older adults. Our staff and volunteer leaders create a strong sense of community and set high standards for programming, management and governance. In addition to the kinds of classes offered by other institutes for learning in retirement, we develop programs to encourage civic engagement and guide participants through the transitions inherent in life's second half. We enjoy productive relationships with many other departments at UNC Asheville and foster partnerships with community organizations that enrich our programming and benefit from the interest and participation of active and thoughtful retirees. As the result of appropriate feeds, some state support, careful management and the addition of endowment income, we are financially sound and able to enter our organization's next phase confidently.

While we enjoy a reputation for "setting the gold standard" for programs in lifelong learning, we anticipate changing conditions at the university, within the state and within the many communities we serve. We aim to maintain a position of leadership in the national conversation on aging and lifelong learning. Therefore, we must anticipate and manage our response to the following circumstances.

- The population of the world, the country and Western North Carolina is aging. As we face the next five years, we seek new ways to meet the varied needs and expectations of multiple generations of people in life's second half and of a growing population of older adults in Western North Carolina. We anticipate changes in the ways we use technology, the kinds of courses we offer, the venues we operate and the audiences we serve. OLLI focuses on the transition from work to retirement and seeks to expand programming to address more of the transitions in life's second half and to engage wider audiences in the conversation about aging. We will expand the programming already offered by organizing courses into a coherent curriculum and partnering with organizations and older adults from populations we do not currently serve.
- The national conversation about retirement encourages older adults to adopt "encore careers," to reap the satisfaction of giving back and sharing experience acquired over the course of a lifetime at the same time that they enhance the human capital of their communities. We are in a strong position to capitalize on this national conversation. Over 95% of our members relocate to Western North Carolina and want to have a positive impact on the wider community. Over 65% of them volunteer on a regular basis. We will enhance the ways we facilitate civic engagement and will address new ways to cultivate fulfilling volunteer opportunities within and outside OLLI.
- We function as a department of UNC Asheville and although most of our funding originates from membership and program fees, we receive funding and support from the university. We are prudent stewards of the funding we receive and are prepared to respond to potential changes in state budget and funding for higher education. We will adopt plans that include metrics to measure our success and our impact on the success of UNC Asheville and the UNC system's broader mission. The university system's strategic plan (adopted in January 2017) and UNC Asheville's strategic plan (adopted in 2016) include goals which focus on economic impact and community engagement. We will enhance and quantify the ways we contribute to these institutional goals as we advance our own strategies.

## **OLLI's Plans, 2012-17 and 2017-2022**

In our 2012-2017 strategic plan, we set and achieved goals to promote civic engagement and life transitions programs and to find new directions for the College for Seniors, our signature lifelong learning program. By following the plan, we defined core values of our member-driven and member-led organization, implemented online registration and assessed our options for pricing and new venues and methods for course delivery. Individual committees worked with the Steering Council to create annual plans that systematically addressed strategic goals. The 2017-2022 plan expands and enhances the work of the earlier plan and outlines innovative and consistent approaches to achieve and re-envision our mission to meet changing conditions.

## **Our Mission**

To provide opportunities to thrive in life's second half through programs in learning, leadership, service and research.

## **Our Distinctive Role**

To be a world-class learning and service community, accessible to and meeting the needs of a diverse and growing population of older adults.

## **Our Core Values**

OLLI at UNC Asheville is committed to the following core values that extend into everything we do and inform all of our planning and program efforts.

- **Sense of Community:** We are a community of adults who share fellowship in an atmosphere that is respectful, stimulating, creative, fulfilling and fun.
- **Lifelong Learning:** We are an enthusiastic group of learners and teachers.
- **Innovation:** We strive to be at the leading edge and model best practices nationally in learning, life transitions and civic engagement programs for older adults.
- **Collaboration:** We collaborate both within and outside OLLI to offer programs that benefit our members and the community.
- **Continuous Improvement:** We seek continuous improvement in our communications, organization, inclusion, operations, programming and facilities.
- **Service:** We encourage our members to grow through service to OLLI, UNC Asheville, and the community.

## **Our Strategic Directions**

Each of our core values extends into all that we do at OLLI. To fulfill our mission, achieve our vision and enhance our programming, we will pursue three connected strategic directions over the course of the next five years. We illustrate each of our strategic directions with actions that will be refined and specified in annual committee plans, through the creation of ad hoc task forces and with the oversight of the OLLI Steering Council and the OLLI Executive Director.

### **Strategic Direction 1: Create a more diverse and inclusive community**

To enhance and enrich our programs, we will build relationships and deepen our understanding of communities that reflect the diversity of our world, our country, our region, our university and our community.

- Maintain the current local membership at satisfied and manageable levels.
- Cultivate partnerships with lifelong learning programs and pilot satellite programs and locations throughout Western North Carolina.

- Build relationships with currently underserved populations of older adults to fuel a diverse and inclusive curriculum and to serve populations not currently attending our programs.
- Foster conversations about aging and end of life among various generations, and build awareness of our programs for an audience not yet in our demographic.
- Create opportunities for OLLI members to volunteer their time and expertise to seek equitable treatment for people marginalized in our affluent communities.

### **Strategic Direction 2: Cultivate and increase resources**

We manage our finances and our human resources so that we are in sound financial shape and are able to meet a growing demand for programming. As we grow, we will promote increased volunteer service and financial support among our membership to maintain our sense of community. We will also support UNC Asheville and the wider community in innovative ways.

- Encourage the ethos of volunteer service as the cornerstone of our organization by improving the ways we recruit and recognize volunteers to carry out OLLI's work.
- Enhance community partnerships with organizations from the broader university and WNC community.
- Establish financial benchmarks and metrics to monitor our fee structures and financial policies so that they remain aligned with our core values and our business needs.
- Implement a coherent and consistent fund raising campaign which uses innovative marketing tools to increase annual fund participation and planned giving and prepares the way for a potential capital campaign.
- Advance connections with UNC Asheville through tutoring and mentoring programs that address the university's focus on student success and offer opportunities for OLLI members to engage with the next generation of leaders.
- Construct a plan to seek grants and "extramural funding" for innovative programming.
- Pilot online learning and mixed platforms through partnerships with the university, the OLLI National Resource Center and other entities.

### **Strategic Direction 3: Create a more adaptive organization**

We will intentionally examine and improve our processes and programming in order to remain relevant as the study of aging and the management of higher education evolve. As we seek a more diverse and inclusive organization we will maintain core values and adapt to new audiences in productive ways.

- Structure curriculum across existing programs to produce coherent and innovative courses, workshops and special events that expand our offerings and audience.
- Build our research capacity, scope and tactics in order to understand and respond to our membership, national trends and regional demographics and economics.
- Implement annual surveys and program evaluations to promote continuous improvement and guide committee and staff work.
- Enhance capacity for programming that responds to current events and trends while still achieving a high standard and consistency.
- Organize OLLI's governance to build on the strengths of current leaders and to invite new people to share our work and our community.

### **The Planning Process**

We began the process with a meeting in 2015 led by OLLI member Steve Barone, designed to have OLLI planning committee members, staff and steering council members envision OLLI 2025 by focusing on our core purpose, clients, relationship to our community, delivery systems and resources. This workshop prompted participants to think ambitiously about our organization's next phase. We then began a yearlong process of meetings of the planning committee and joint meetings of the planning committee

and the steering council to begin to prioritize the goals and ideas generated by the meetings. Findings and recommendations from the original vision meeting and from this series of meetings were used to develop strategic directions and to validate the purpose, mission and values of OLLI.

Each OLLI committee was tasked with determining how they contribute to the strategic directions defined by the planning committee and steering council and to assess the challenges they might encounter and what resources they might need to achieve and follow our strategic directions.

The Planning Committee developed a form for creating and reporting annual plans as part of a process to focus attention on strategic directions and to make sure that the strategic plan remained a living document.

### **Next Steps**

We want our committees to focus their activities on strategies to achieve the plan's goals. Committees will plan annually and report twice a year on their progress. At monthly meetings, the OSC will convene productive conversations to assess progress, cultivate resources and improve the organization.

### **Annually: 2017-22**

The OSC year runs from July 1 to June 30 every year, following the university and OLLI's fiscal year. The OSC meets monthly and each month will include updates and conversations about strategic directions and committee planning for coming months.

- In August each year, standing and ad hoc committee chairs will consult with members of the planning committee and the Executive Committee to outline projects for the year. In August each year, beginning in 2017, each OSC committee will propose and complete annual plans that address the strategic directions with detailed project plans. The Planning Committee, the OSC Executive Committee and the Executive Director will review all plans to ensure that project plans address relevant issues and that various committees are collaborating effectively.
- Twice a year, in December and June, each committee chair will fill in a simple form that includes a summary of concrete actions to follow strategic directions and complete project plans
- In February each year, each committee will work with the planning committee and the finance committee to begin the process of planning budgets for the upcoming fiscal year and to plan
- In June each year, beginning in 2018, at the OSC transition meeting, each committee will review completed projects and ongoing work to implement the strategic plan. The OSC will assess and validate the purpose, mission and values of OLLI and discuss potential changes or additions to the three strategic directions defined in 2017.

### **Beginning in January 2021**

The planning committee will outline the process to update the strategic plan and begin the process of selecting and prioritizing new strategic directions.

### **OSC Members 2015-17:**

Chair: Catherine Jordan & Kirk Borland

Chair Elect: Kirk Borland & Bobbie Rockwell

Past Chair: Patrick Chitwood & Catherine Jordan

Secretary: Kathleen Mainardi & Jacob Cohen

Civic Engagement: Sarah Reincke

College for Seniors: Cindy Berryman-Fink, Erik Vedeler and Paula Withrow

Facilities: Terry Liles (current), Barry Mundt (past)

Finance: Terry Reincke

Hospitality: Sandy Bowles (current), Stephanie Ward and Kathleen Mainardi (past)

Inclusion: Larry Haas and Allen Brailsford

Life Transitions: Dave Castel

Marketing: David Langdon (current), Kirk Borland (past)

Planning: Barbara von Hauzen

**Planning Committee Members:**

Chair: Barbara von Hauzen, Members: Allen Brailsford, Sam Harben, Laurel Jernigan, Catherine Jordan, Marc Miller, Charles Moseley, Bill O'Connell, Terry Reincke and Roberta Willis