

## OLLI AT AU STRATEGIC PLAN 2018-2023 SUMMARY

### THE MISSION

*To provide rich and meaningful educational and intellectual experiences to members by offering a variety of learning opportunities. OLLI at AU is dedicated to the proposition that learning is a lifelong process and that curiosity never retires.*

### THE NEED

OLLI at AU's previous strategic plan was completed in 2012 at a time when the organization had been housed primarily in the Temple Baptist Church for more than 20 years and had added scattered satellite spaces as membership grew. Following the negotiation of a ten-year lease and the Fall 2016 move into American University's modern Spring Valley Building, the OLLI at AU Board of Directors was eager to analyze the long-term growth potential of its membership and programs and the impact of that growth on space and financial stability.

### THE PROCESS

The Board established a Strategic Planning Committee in summer 2016. The committee won a grant for assistance from Compass, a strategic consulting service that provides pro bono management advice to nonprofit clients in the Washington area. The Compass team of nine business consultants provided program and financial analysis during its eight-month engagement.

From October 2017 to May 2018, the Board of Directors, staff, strategic planning team, Compass consultants, and OLLI members developed together the data and analyses that inform the final plan. The work program included interviews with directors of other Osher Institutes as well as AU faculty and senior administrators, analysis of growth scenarios, OLLI member focus groups and surveys, preparation of five-year projections linking growth of budget, membership and classroom space, and market analysis.

### WHAT WE LEARNED

- Focus groups and surveys revealed members love OLLI at AU: 99 percent of respondents report they are "Satisfied" or "Very Satisfied." Most members are comfortable with the current academic and social program, membership size, facility, and academic calendar, but are open to some change.
- In recent years, OLLI at AU membership has grown between 4 percent and 6 percent annually, and an April 2018 survey revealed that most members are comfortable with this rate of growth.
- The 10-year lease with AU includes use of six classrooms with seating capacity ranging from 20 to 30, a lecture hall with 105 seats, social gathering spaces and administrative offices. The use of classroom and lecture spaces is shared with AU and they are generally available to OLLI from 9:45 AM to 3:15 PM, Monday through Friday, twelve months a year.
- An analysis of classroom utilization during the past year revealed that OLLI at AU was operating at 82 percent to 86 percent capacity, leaving between 368 and 467 seats available in some classes each semester. In addition, the expanded OLLI academic calendar still leaves classrooms unused for part of the year.
- American University is itself pressed for space to accommodate its growing number of students and programs and has been working to maximize its own use of classroom space by extending the daily class schedule and the academic calendar.

- A strong, collaborative relationship with American University is essential for the continued success of OLLI at AU as it seeks to strengthen its academic program and grow its membership.
- In recent years, OLLI at AU expenses have climbed faster than revenues and net asset growth has slowed. If tuition is to remain affordable, the OLLI at AU program and facility maintained at current high levels, and the reserve fund increased to meet future needs, new revenue sources will have to be tapped.

## THE GOALS AND SELECTED IMPLEMENTATION STRATEGIES

- **MEMBERSHIP GROWTH** *Welcome lifelong learners in the Washington, DC area who seek to join the OLLI at AU community, manage sustainable growth to reflect financial and space constraints, develop strategies to expand the diversity of the OLLI membership, and maintain the sense of community along with growth.*
  - Develop market efforts, test extending class schedule, raise awareness of OLLI within and beyond the AU community, offer scholarship, expand partnerships with academic, community, and civic organizations to advance inclusiveness and expand impact
- **SPACE** *Seek to accommodate moderate membership growth in the Spring Valley Building with all classroom, office, lecture and social spaces offering a modern, technology-equipped, and welcoming environment.*
  - Maximize use of classrooms by extending the academic calendar, expand short format sessions such as Shorts and Minis, grow the Friends of OLLI Fund to ensure future options for space within and beyond the Spring Valley Building if required
- **PROGRAM** *Continue to enhance the “college-like” experience of OLLI at AU and maintain the current high levels of member satisfaction.*
  - Increase support and training for Study Group Leaders, recruit new Study Group Leaders from within and beyond the OLLI at AU community, develop curriculum to focus on broader policy and cultural issues, improve member communication, and structure Curriculum Committee to support a 12-month academic program
- **FINANCIAL MANAGEMENT** *Ensure long-term financial stability that keeps pace with a growing membership, supports an academic program of unrivaled excellence, and grows the Friends of OLLI Fund for future needs.*
  - Establish a Finance Committee to provide greater oversight, provide greater financial transparency
- **FUNDRAISING** *Establish a culture of giving that 1) supports OLLI at AU core programs while keeping tuition affordable; 2) funds special initiatives; 3) grows the Friends of OLLI Fund for future needs.*
  - Prepare a development plan, prepare an annual report to improve outreach to members and donors, extend solicitation to foundation and corporate donors, increase member-donor participation rate to 40 percent, solicit advertising and sponsorships in catalogs, at events, etc.
- **AU RELATIONSHIP** *Build a collaborative partnership with American University that contributes to the shared core principles of academic excellence, lifelong learning, community engagement, and organizational strength.*
  - Recruit additional AU schools/departments/emeritus faculty to participate in the OLLI curriculum, establish programs to acknowledge such participation, consider discounted OLLI membership to AU alumni, expand partnership with Accelerator program

Revised May 2019

N.B. The Board of Directors annually reviews the strategic plan to revise as necessary goals and implementation steps.