

## **OLLI-GMU Strategic Plan - Introduction**

OLLI-GMU's current Strategic Plan dates from 2009, when the planning committee completed "Pathways to the Future". That plan was organized around five major topic areas—membership, programs, facilities, finance, and organization. It included relevant history in each area since the organization's founding in 1991, and identified short-term and strategic actions in each.

In December, 2017, OLLI-GMU's strategic planning committee began work on updating the "Pathways" plan. In July, 2018, these goals were presented to the Board of Directors and committee chairs at a board retreat. With only minor changes, the recommended strategic goals were accepted.

The work of that committee was interrupted in March of 2020 with the onset of the COVID-19 pandemic. OLLI-GMU quickly and successfully pivoted to distance learning on the Zoom platform. Virtual learning quickly became an asset that enabled our organization to reach out to people who no longer live in the area and those who are mobility limited. Additionally, it obviated the traffic problems that had hindered wide participation in programming among our three disparate locations. At the same time membership, which had been shrinking for a number of years, further declined.

The purpose of this document is to complete the task of developing a new OLLI-GMU Strategic Plan based on the strategic goals developed in 2018 by the committee and approved at the board retreat.

This plan will not seek to duplicate the work of the 2018 document, which included a description of actions taken from the "Pathways" document. Instead, this plan is based on a fresh analysis of the challenges and opportunities OLLI-GMU faces given the changed situation within which we operate. In it, we look ahead to a mixed future combining in-person, hybrid, and virtual programming, and posit broad goals as the foundation for an annual OLLI-GMU operational plan developed by the individual working committees.

## **ASSUMPTIONS UNDERLYING THE STRATEGIC PLAN**

OLLI's mission – offering intellectual and cultural experiences in a welcoming atmosphere that promotes lifelong learning – will remain unchanged.

Our OLLI chapter will remain affiliated with GMU, which will continue to provide the Tallwood and the Loudoun facilities. OLLI-GMU will continue to be able to tap into a remarkably talented pool of highly experienced retirees willing to teach and learn from each other. GMU faculty will continue to participate as content providers.

Northern Virginia will remain OLLI-GMU's primary catchment area; however, technology will allow us to reach beyond that area virtually as well.

In the near-term, COVID-19 will continue to constrain in-person activities and exert downward pressure on membership. Accordingly, OLLI-GMU will use a mix of in-person/hybrid/distance learning (e.g.: Zoom) vehicles to deliver programs. The mix will be determined by member preferences, class size, availability of technical facilities, CDC guidance, GMU facilities policies, and any venue-specific seating limitations we encounter in rented space.

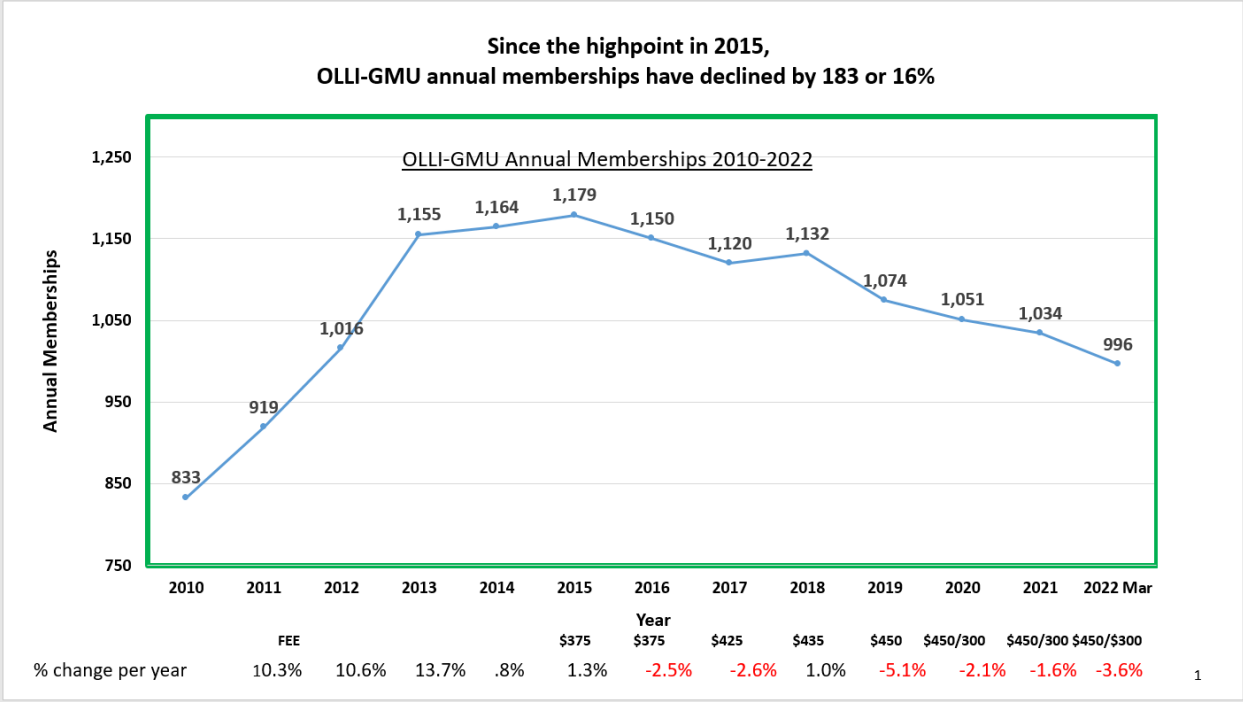
In the medium-term, demand for OLLI-GMU programs, including in-person programs, is likely to increase. COVID-19 constraints will ease as vaccination rates go up and effective treatments roll out. The "great resignation" now underway is expanding, and will continue to expand, the pool of retirees. In the third quarter of 2021, a Pew Research poll indicated that 50.3% of adults over 55 said that they were out of the labor force due to retirement, up from 48.1% a year earlier. The aging of the population will also increase demand for OLLI-GMU's services. According to US Census Bureau data, by 2030, over-65s will comprise 21% of the population, up from 15% in 2018. Demand also may increase as targeted outreach to presently underserved population groups is undertaken. This would have the additional effect of increasing the OLLI-GMU's diversity.

There will be increased competition among organizations designed to service the over-50 cohort's educational and social interaction needs. OLLI-GMU's leading-edge experience in distance learning, access to an exceptional talent pool of retiree instructors, and relationship with a leading local university will be our key advantages in that competition.

## **OLLI-GMU Strategic Plan – Membership**

- a. **In 2015, OLLI-GMU membership reached a height of 1179 members. Since 2015, the organization has experienced a significant decline in membership due to factors including death or departure of members, and increased competition from less expensive entities with similar programs. Nevertheless, Olli-GMU's membership has continued to total approximately 1000 even in the face of the challenges of unprecedented change that COVID-19 has brought.**

The following chart documents the trajectory of OLLI-GMU’s overall membership.



**2. OLLI-GMU currently offers three types of membership.**

- a. ANNUAL MEMBERSHIP \$450.00 An annual membership provides unlimited access to all OLLI-GMU locations, Zoom and in-person programming, a library of recorded lectures, and special events.
- b. New Member SPECIAL ANNUAL MEMBERSHIP \$300.00 New members can use this discount if they have never been OLLI members before, are returning to OLLI after more than a year's hiatus, or have previously been introductory members and haven't converted to full membership. It includes all the benefits of an Annual Membership.
- c. INTRODUCTORY MEMBERSHIP (one term only) \$150.00 The special introductory rate is only available to individuals who have never been a member of OLLI (introductory or annual). Introductory Membership is valid for one use and a one-time only offer.

- d. The following chart outlines OLLI-GMU's current membership breakdown by type

Membership Update/BOD Report  
As of April 8, 2022

	2015	2021	2022	Difference 2022 vs 2015	Difference 2022 vs 2021
<b>Membership Types Purchased</b>					
Annual Memberships - Full: Winter & Spring (not final)	520	358	355	-165	-3
Annual Memberships - Promo: Winter & Spring (not final)	0	80	75	75	-5
<b>Total Annual Memberships Purchased</b>	<b>520</b>	<b>438</b>	<b>430</b>	<b>-90</b>	<b>-8</b>
Introductory Memberships: Winter & Spring (not final)	62	23	20	-42	-3
<b>Total Memberships purchased</b>	<b>582</b>	<b>461</b>	<b>450</b>	<b>-132</b>	<b>-11</b>
<b>Current Active Memberships</b>					
Annual memberships: Summer through Spring	1156	1029	992	-164	-37
Intro Memberships: Spring	35	12	8	-27	-4
Lifetime memberships	6	5	5	-1	0
<b>Total Active Memberships (Annual, Intro &amp; Lifetime)</b>	<b>1197</b>	<b>1046</b>	<b>1005</b>	<b>-192</b>	<b>-41</b>

3. OLLI-GMU faces an ongoing need to recruit new members because the downward trend in membership threatens its long-term existence. While OLLI-GMU will continue to offer the above-described membership types, additional tools will have to be developed to attract new members. Broad areas of emphasis will include:
- Aligning all programming to more directly satisfy membership demands regardless of geographic location or delivery mode (hybrid/zoom/in-person).
  - Committing to provide the resources necessary for expanding and integrating activities aimed at recruiting more members in the Northern Virginia region and beyond.
  - Increasing member involvement in all aspects of OLLI-GMU activities
  - Conducting outreach to communities presently underrepresented in OLLI-GMU's membership.

# **OLLI-GMU Strategic Plan - Organization**

**1. Maintain our OLLI chapter's contractual link to GMU; enhance the level of cooperation and coordination to the benefit of both; and maximize our human capital resources.**

a. During the upcoming contract period, consider the pros/cons of proposing that our chapter become an official subsidiary of GMU.

b. Simultaneously, examine OLLI-GMU's options regarding key human capital issues. On the staffing side, those issues include: the number and type of paid staff; staff access to benefits; salary levels; and the possible transfer of paid staff to GMU. On the volunteer side, those issues include: appropriate incentives for volunteer teachers; identifying and recognizing outstanding volunteers; and retaining/growing the volunteer base.

**2. For the next three years, continue organizing activities geographically (Fairfax, Reston, and Loudoun locations).**

a. Enhance current efforts to revitalize programming in Reston and Loudoun.

**3. At the end of year two, as the COVID-19 crisis abates, examine and assess how well we are organized to deliver educational services in the post-COVID-19 environment.**

a. Identify trends in the activity demand pattern for each of the three primary vehicles of program delivery (in-person; zoom; hybrid) in each geographic location.

b. In addition, determine the degree to which people outside of our traditional catchment areas are participating remotely in OLLI-GMU activities.

**4. During year three, reassess (on a cost-benefit basis) the need for organizing programs along geographic lines based on the examination discussed in point 3.**

**5. The President and/or Executive Director will instruct relevant committees to examine periodically their implementation of the Strategic Plan areas for which they are responsible. Require them to report the results of that examination to the Executive Director and the Strategic Committee Chair, who will then inform the Board of Directors about Strategic Plan implementation at a designated monthly Board meeting.**

**6. As OLLI-GMU reaches a post-pandemic 'new normal,' examine current marketing and communications practices to ensure that they are consistent with the demands imposed by our new operating environment.**

## **OLLI-GMU Strategic Plan - Facilities**

**1. Our present three geographical locations at which we have physical facilities, Fairfax, Reston, and Loudoun, will continue to provide sufficient geographic diversity for in-person classroom and socialization space.**

- a. We will continue providing/renting sufficient adjacent parking, including handicapped parking.
- b. Offices for staff will continue to be provided at the main Fairfax location, and at the other locations as needed.
- c. We will continue providing adequate technical equipment and storage for our classrooms in each of our operating venues.

**2. Based upon our end-year 2021 membership, its possible growth over the next 5 years, and the anticipated 50-50 split of members attending in-person classes vs. on-line classes based on the most recent member survey, the capacity of our current physical facilities will be adequate to accommodate our anticipated activities through 2027.**

- a. We will continue to rent facilities for in-person classes in Reston.
- b. We will rent facilities for special events and/or large lectures as needed; however, we expect large lectures to transition primarily to Zoom. This will reduce our rental of outside facilities over time.
- c. As we roll-out Zoom capabilities, an increasingly large percentage of classrooms will have the capability to host hybrid in-person/zoom classes.
- d. Online-only video classes via Zoom will not require use of OLLI-GMU facilities since instructors may present them from remote venues.
- e. Access to the Reston Community Center's resources, (particularly the Rose Gallery), will continue to be adequate for a variety of OLLI-GMU programs.

**3. As part of our agreement with GMU, the current sites at Loudoun and Fairfax will continue to remain available and be cost-free**

- a. In 2022, we will renegotiate and extend our Fairfax use agreement through 2027 with GMU. As part of these negotiations we will request that by 2027, the University provide OLLI new space in a GMU facility in Fairfax.
- b. It is our goal to eliminate the 30-day move notification requirement.

## **OLLI-GMU Strategic Plan – Financial**

**1. As noted above in the Membership section, our current declining membership numbers threaten OLLI-GMU’s long-term existence. If we are to continue to retain the ability to provide a diverse set of in-person programs at all current locations as well as make the transition to hybrid program delivery, we have to act aggressively to maintain and expand membership, constrain costs, and obtain new funding sources.**

a. Membership dues fund most of our operating budget. Accordingly, as a first step we must reassess our dues structure. For example, if we are successful in implementing non-traditional forms of membership, such as zoom-only or joint membership via affinity groups such as residents of an assisted living facility, a multi-tiered dues structure may become necessary.

b. We must implement additional cost control measures. While we have realized some savings, (reduced cost of producing catalogues for example), we have also incurred new costs in technology. Those costs will increase as we continue rolling-out hybrid classrooms. Potential cost control measures include: reexamining our compensation plan in light of practices of other organizations and our own resources; developing ways to substitute volunteers for paid labor; and limiting the use of site assistants to in-person and large hybrid classes.

c. We will develop sources of outside income. “Pathways to the Future” examined these options. We are currently exploring some of them, especially the effort to develop grant support and potential partnership relationships with from a variety of donors. “Pathways” also considered novel ways to raise money. We need to reexamine some of these options, including electronic campaigns, corporate sponsorships where feasible, and a structured planned giving effort.

d. We will continue to monitor the best practices of our competition to ensure that we remain competitive

## **OLLI-Mason Strategic Plan – Programs**

**1. OLLI-Mason’s vast and varied program has earned us a national reputation. In 2021 – an unusual year when Covid constrained our offerings – we nevertheless offered more than 470 online courses to our members. The great majority of these online classes maintained the excellent quality of our in-person classes. All were taught by volunteer teachers/presenters. Since the quality of our offerings is our core strength, we must devote consistent attention to developing a diverse and attractive set of courses and activities.**

a. We must intensify efforts to recruit and support excellent volunteer teachers. Sources include: OLLI-GMU’s membership; GMU faculty and graduate students; and the

Washington area's unusually rich pool of resources such as employees or retirees from foreign embassies, government agencies, think tanks, the media, local governments, schools, and enterprises.

b. With distance learning and teaching, we now have the opportunity to draw on experts from anywhere in the world for our online classes. Program planners – and members in general – should be encouraged to “keep their antennae up” for contacts who could make good teachers/presenters.

**2. As OLLI-GMU's outreach to currently underserved/underrepresented groups increases, (see membership section, above), additional attention will have to be paid to expanding programs designed to meet the particular needs and interests of new members.**

a. The Member Services and Program Planning Committees should work together to enhance and expand their current outreach activities. This will facilitate the incorporation of members' feedback into the development of new programs designed to appeal to potential new members.

b. Programming should satisfy members' demands/desires regardless of delivery mode (online/hybrid/in-person). Each of these types of programs must be robust enough to provide varied classes in all parts of the schedule.

c. For “online-only” members (whether in a separate membership category or not), unique educational needs should be carefully considered with input from students, teachers, and program planners. This is especially important if these “online-only” members are in continuing care facilities.

**3. OLLI-GMU's recorded class archive, developed during the Covid-19 crisis, has become very popular, and is a wonderful resource. We should continue to maintain, and if practical expand, this archive and highlight it in our print/on-line catalog.**

**4. As the Covid-19 crisis recedes, and returning to in-person learning becomes increasingly feasible, assess trends in class size, (both in-person and on-line), as well as the utilization of multi-session vs. single-session classes in order to better tailor future offerings to the desires of Olli-GMU's members. Explore ways to incorporate additional participatory classes (cooking; art; music) in Olli-GMU programming.**

#### **Strategic Planning Committee**

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