Are You Ready to Plan for the Future of Your OLLI?

A Tale of Two OLLIs

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Today’s Presentation

To be posted on the Virtual Resource Table

- An overview of planning
- An argument for why planning is particularly important (and rewarding) for OLLIs
- The tales of planning efforts at two OLLIs at different points in their history and development
- Elements of strategic plans: Defining the product
- Advice for creating an OLLI strategic plan
- Questions and comments from participants
Strategic Planning Defined

- The process of determining what we intend to achieve and how we will direct the organization and its resources toward accomplishing those goals over time.
What Strategic Planning Is

- **A process that builds a roadmap that**
  - Helps us illuminate the mission and vision of our organization for our stakeholders and constituents
  - Provides a management tool used as the framework to build advisory council meeting agendas and direct committee activities
  - Defines what we will and will not commit time and resources to during our planning horizon
Strategic planning is NOT the use of a crystal ball to determine your organization’s future. It requires investment of resources and vision and also requires constant revision if it is to be something more than a door stopper.
Why planning is particularly important and rich in OLLIs

- **A complex** set of stakeholders makes it critical and possible to find common directions and varied perspectives.

- OLLI members come from a variety of planning experiences and backgrounds. Manage expectations but recognize the power of this potential resource.
Your OLLI has the resources you need!

OLLI at UNC Asheville has people who have created strategic plans for every kind of educational organization, for municipalities and businesses. This variety of approaches, when managed well, leads to a rich plan uniquely adapted for your OLLI.
Why planning is particularly important and rich in LLIs

• A plan can demonstrate that you speak and understand the language of the university
Why planning is particularly important and rich in LLIs

- OLLIs track and manage their financial and volunteer resources carefully. Matching strategic priorities with personnel and budgetary priorities helps set priorities for spending that advance the mission of the organization.
UNC Asheville’s Planning Tale

- A little bit about UNC Asheville
- A short history of the organization
- Previous planning efforts
- The current planning process, emphasizing challenges and lessons learned
OLLI at UNC Asheville has had a number of plans over the course of its 25-year history and continues to learn practices that work for us.

- We have set goals for ourselves (grow the membership; create innovative programming; raise funds to build a building) that have led us where we wanted to go, but have relied more on individual effort than on project planning.

- We were creating annual plans that never seemed to get much traction because we spent too much time every year discussing the distinction between goals and objectives and wordsmithing than on settling on what we wanted to accomplish.
What we wanted to do differently in developing our current plan

- We wanted to address some of the areas where we were falling short (a program that had not been planned to be financially stable, areas of programming that had not been refreshed, a failure to involve larger groups of people in planning, some inefficiencies in committee operations)

- We wanted to see if we could stick more clearly to our mission (to provide opportunities to thrive in life’s second half through learning, leadership, service, and research)

- We wanted to have a plan that our members and committees would consult often and that would lead to continuous improvement even in areas where we felt we were already doing well
How we make our plan live

- Begin with listening sessions to create a larger base of stakeholders (we followed a strategy outlined by our chancellor, Anne Ponder, and available at the following link: http://www.coloradocollege.edu/dotAsset/4fe80cb0-2db9-49dc-b7c0-7eb4886c1899.pdf)

- Create a system for implementation that would link the annual planning process for committees to implementation of the strategic plan (every year, our Executive Committee sets out the priorities and the committees or task forces that will be stakeholders responsible for different elements of the plan)
How we make our plan live

- Report on progress systematically, frequently, and to different stakeholders

- We have quarterly progress reports at our steering council meetings

- Our planning committee and members of the executive committee work with committees to draft annual plans with strategic plan goals in mind

- We report on goals accomplished in our newsletters and in our annual Town Hall meeting

- We annually add to or remove plan goals as our needs and challenges change
What we learned

- Committee members may push back if they feel that the planning process is too challenging or corporate. Find a core group of champions who will cajole and persuade people to recognize the planning timeline (not everything needs to be achieved at once) and also to work annually and report until stakeholders are sold on the idea.

- Sharing the plan can be a way to make it exciting and to find new stakeholders. This can be other people within your department or host institution or it can be members of your organization. Ultimately, getting things done, especially things that have been lingering on a to-do list, can be exciting and fulfilling.
Dominican’s Planning Tale

- A little bit about Dominican University
- A short history of OLLI at Dominican
- Previous planning efforts
- The current planning process, emphasizing challenges and lessons learned
Components of a successful strategic plan

- **Mission statement**

  Dominican’s mission statement: “OLLI at Dominican engages people over 50 with intellectually stimulating lectures and workshops that promote informed thinking and intelligent discussion with social interaction. Liberal arts and sciences courses are taught by distinguished and dynamic faculty, creating meaningful learning experiences.”
The best mission statements are clear, memorable, and concise. They should express to stakeholders and the public why an organization exists, what it does, and who it serves.
Components of an effective strategic plan

- **Vision statement**: Dominican’s proposed vision outline

- Promote core values of lifelong learning, leadership, collegiality and community

- Increase premium membership by adding classes and privileges for premium members

- Maintain competitive tuition and faculty salaries

- **Environmental scan or organization assessment**

- Survey covering all dimensions of a program
You have to pay attention to the external environment; assessing strengths, weaknesses, opportunities, and threats is an ongoing component of a successful strategic plan
Components of a successful strategic plan

- Assumptions
  - Membership support
  - Dominican Advancement Office support

- Strategies
  - Educate members on the need and the impact of philanthropy
  - Build a major gifts program
  - Enhance website to add ways to give

- Measurable goals
  - $22,000 Annual Fund and $20,000 grant
Advice for building an OLLI strategic plan

- Begin by establishing a clear sense of what you do well, who benefits from your organization, and what resources you have or will need to realize your vision.

- Involve as many people as possible to analyze your environment, challenges and opportunities. Use the planning process to create and galvanize stakeholders.

- Find a small group of people who have listened to the stakeholders to craft and draft a workable, sustainable plan.
Advice for building an OLLI strategic plan

- Don’t get bogged down in process or language.

- Get a core of leaders who are committed to the implementation of the plan (not just to creating a vision)

- Be willing to set ambitious goals and make sure people know your planning and implementation horizon
Advice for building an OLLI strategic plan

- Consistently check your environment for changing conditions and adjust your goals as necessary. Understand that planning is not a linear process.

- Create a simple method for assigning priorities and project managers so that action is on the minds of people who can make a difference. Take some of the accountability from corporate models, but make sure that this is meaningful and fun for volunteer leaders.
Advice for building an OLLI strategic plan

- Take every opportunity to share the plan with stakeholders and implementers
- Celebrate progress and address setbacks, changes, and changing strategies and priorities
- It may seem daunting, but any organization can create a road map that helps them to reach goals
Now, share your planning success, questions, and concerns

*We will post this presentation online, along with our strategic plans and other documents, as part of the conference Virtual Resource Table*
What we hope you will take away

• Wherever you are in the history of your organization, whatever your strengths, weaknesses, opportunities and challenges, planning is possible and productive

• Planning can help you think big picture but direct you to act in concrete, measurable ways

• Planning can bring new stakeholders to participate in the success of your program and create residual benefits

• When it comes to planning, you have to “Just Do It.”
Strategic Planning

It is a far, far better thing that you will do, than you have ever done;
it is a far, far better future OLLI that you go to than you have ever known.

Apologies to Charles Dickens