Mission Statement: To provide a self-directed, creative and inclusive adult learning community emphasizing intellectual stimulation and cultural enrichment.

Vision Statement: To be recognized as the preeminent local organization that serves the intellectual and cultural needs of a diverse over fifty year old population.

Areas of Focus/Priority
I. Curriculum Growth
II. Expand and Diversify Membership
III. Financial Stability
IV. Public Relations and Marketing
V. Social and Cultural Enhancement

I. Curriculum Growth

Overall Objective
Provide diverse offerings, in a variety of venues, of quality curriculum to meet the demands of current and increasing membership.

Goals and Strategies
A. Select and prepare chairpersons for the leadership positions in the new curriculum structure.

B. Insure cross committee communications through the communication, planning, and operating procedures and guidelines of the new curriculum structure.

C. The curriculum will meet the members’ diverse needs; considering age, convenience, work status, interests, learning preferences, and physical limitations.

D. Provide and maintain a process for obtaining ongoing membership input for new programming ideas across all programming sub-committees.

E. Identify and recruit new instructors from the membership.

F. Accomplish sub-committee goals:

1. Special Interest Groups (SIG’s)
   a. Have 18 SIG groups in a variety of areas to accommodate the diverse needs of the expanded membership.
   b. Conduct an annual survey to determine membership interests/topics for SIG’s
2. Travel
   a. Form a travel committee.
   b. Plan and implement at least five trips annually.
   c. Conduct an annual membership survey to determine the travel interests.

3. Lectures
   a. Plan and organize three fall and three winter Dean’s lecture series.
   b. Plan and implement three to four special lectures that generate revenue.

4. Core Programming
   a. Plan and execute fall, winter, and summer Potpourri sessions.
   b. Conduct annual surveys to determine the interests of the membership.
   c. Plan and execute 30 to 40 Short Courses for the fall and winter.
   d. Plan and execute 10-12 Go Explore trips per term.
   e. Summer offerings will include 10-15 Go Explore and 6-10 short courses.

II. Expand and Diversify Membership

Overall Objective
Working in collaboration the Public Relations and Membership committee will expand membership to a sustained level of 1000 members and lay the groundwork for expanding to 1500 members.

Goals and Strategies
A. Develop a 1000 member recruitment plan (coordinated by Marketing and Membership Committee) and reach a sustained level of 1000 members by May 2014.

B. Prepare profile of different potential member needs and interests (by age, work status etc.)
   1. Devise recruitment strategies for each membership profile
   2. Provide a diversity plan for recruitment; present to the Board by November 2013.
   3. Meet with committee chairs to plan for implementation.

C. Attract an increasingly diverse membership including, gender, race, geographical location.
   1. Use face-to-face one-on-one invitations with purpose
   2. Ask each member to bring in one new potential member to a program. “Each one reaches one” philosophy of new member mentorship (Membership Committee)
   3. Develop a road show presentation that defines the objectives and programs of Osher—present this to appropriate diverse groups throughout the Milwaukee area—target 20 groups/year beginning in fall of 2013 (PR committee)

D. Execute a follow-through for non-renewing members;
   1. Institute “A step-wise” contact and reminder for re-enrollment.
   2. Done on a yearly basis to encourage those who are tardy to pay their dues.
III. Public Relations and Marketing

Overall Objective
The University of Wisconsin - Milwaukee Osher Lifelong Learning Organization and its benefits are well known and highly regarded by University supporters, program and financial contributors, members and prospective members.

Goals and Strategies
A. Encourage and empower current members to become more aware of OLLL benefits, and become active in communicating the benefits of the Organization, recruiting new members and volunteering their time and expertise
   1. Create and disseminate wallet/purse cards that briefly describe Osher and its features and benefits while also providing contact sources and information. The cards will first be described/explained in the Newsletter then several will be mailed to every member’s home. New members will be given cards at orientation, additional cards will be available at Osher events and cards will be mailed to members upon request.
   2. Place articles in every Newsletter that expand on one or more benefits of membership (“Did you know?” “Fun Facts about Osher.” “What you get from your membership”, etc.
   3. Initiate bi-annual Membership drives prompted by newsletter articles, bring-a-friend incentives (Free attendance at a potpourri, rewards of gift donations from local business, etc.)
   4. Develop and communicate a gift membership program that encourages current members to give a one-year OLLL membership gift to friends, family and neighbors and relatives. The program will be announced in the Newsletter and other focused community communications.
   5. Encourage Member presence at community events (example: State Fair) where they can help generate interest in the organization.
   6. Recruit Members to speak to or meet with members of target groups. These would be short talks extolling the benefits of OLLL to groups consisting of potential members and of people likely to influence potential members.
   7. Launch a multi-faceted messaging series that encourages Members to volunteer as presenters, members of committees, and for leadership positions. Messages will focus on the how volunteers will personally benefit from their participation

B. Create and focus tailored and simple messages toward defined external audiences.
   1. Prospective Members – Prospective members will be “described” and “located” to guide the creation and execution of cost-effective direct communications designed to attract their interest. Identification can also be used to guide future course development. New members drawn from each of the groups described below will significantly enrich the organization’s membership.
      i. Major Hispanic-American and African-American community groups. Current membership is significantly under-represented by members of both groups. Messages will be created that will attract interest.
ii. Gender – Men are significantly under-represented in the current membership mix. Messages will be created that will attract interest.

iii. Age – Current membership skews older. Messages will be created and placed that will describe the long and short-term benefits of membership to prospective younger (50-60) people whose active participation will benefit the organization for years to come. (Possible umbrella communication theme: You’re never too young for Osher)

iv. “Instruction capable” – The organization will be significantly enriched with the addition of new members who are not only life-long learners but are also capable and willing to share their knowledge and experience with other members.

2. Non-member Advocates/Influencers – The organization will reach prospective members unaware of Osher and its benefits by launching messaging programs reaching family members, community organizations and meeting places, businesses in touch with retired employees, educational retirement organizations, retirement complexes and through influential persons.

   i. General community – Regular news releases will be sent to local radio stations as well as broad-circulation and community newspapers that announce new programming and other OLLI initiatives while briefly describing Osher and its benefits. Theme ... “Osher: THE place for people just like you”

   ii. Social Service Agencies serving seniors – Custom articles and/or pamphlets will be prepared which organizations can distribute encouraging their clients to “Check Out Osher”. Each organization will also be provided with regular notices of upcoming programming.

   iii. Retirement organizations – Timely articles will be sent to MPS, UWM, Marquette, MSOE, and other retirement associations that encourage active Osher Membership. Theme: “Experience just too darn good to waste”

   iv. Companies (Northwest Mutual Life, Harley Davidson, Manpower, GE, etc.) in regular contact with retirees and current employees – Targeted Companies will receive regular notices of upcoming programming. Theme: “Osher ... Try it! It will like you”.

   v. Senior Centers – Pamphlets and regular bulletin board announcements will be supplied to Center administrators for bulletin board posting. Theme: There’s more to life with Osher”

   vi. Libraries and retirement living complexes – Attention grabbing bulletin board notices aimed at potential members and non-member advocates will be sent to and/or placed in community libraries and social centers. Theme “So ... just what’s not to like about Osher?” Notices will reference gift certificates

   vii. Churches, mosques and synagogues – Regular teaser articles will be sent describing Osher and upcoming programs for the season. Theme: “So much more to life with Osher”. Articles will reference gift certificates

   viii. Internet social networking – designed to provoke family members to encourage their parents and grandparents to join Osher. Theme ... “Staying mentally and socially active with Osher”. Messages will reference gift certificates

   ix. Spokespersons – enlisting high media profile personalities willing to occasionally present to Osher members and to extol Osher benefits at every opportunity.
x. Endorsers – Activity will focus on obtaining and then disseminating publishable endorsements from reputable community medical and social service professionals/personalities about the social, intellectual and interactive benefits derived from Osher participation. Messages will be supported with articles gleaned from the Internet.

3. Employ outreach sampling and gifting techniques to attract and expand interest
   i. One-time classes/sessions at Senior Centers and Libraries – Two 30/60-minute classes with high appeal that repeat at regular intervals in different locations. One class will be ” for Osher with pass-outs”.
   ii. Give a gift of Osher. One-year gift certificates will be made available for giving to family members, friends and neighbors. The program will be announced in the Osher Newsletter and in other focused community communications.

IV. Financial Stability

Overall Objective
Remain fiscally responsible and financially stable; meet the financial requirements to qualify for the second million dollar endowment.

Goals and Strategies
A. Establish a Financial committee by February 2014.

B. Work with the Board and all Osher committees to determine each committee’s budget needs annually.

C. Identify and execute revenue generating initiatives that result in at least $15000 by May, 2014.

D. Plan and implement procedures for obtaining planned giving from the membership.

E. Create three to four special events/per year for raising funds.

V. Social and Cultural Enhancement

Overall Objective
Deliver a positive social and cultural experience in a welcoming environment.

Goals and Strategies
A. Create and foster socially participative special interest groups.
   1. Provide social group suggestions to the SIG director. (Programming Committee)
   2. Develop a Brown Bag Lunch where members would discuss/learn and share activities that are of interest (Social Committee)
   3. Create procedures for extension of classes that want to continue studying a subject after the formal class sessions have ended—each group decides how long they will meet. (Social & Programming Committees)
B. Create a welcoming environment so all events become socially participative. (Social Committee, staff and all members)
   1. Create a social atmosphere before and after the classes.
   2. Provide guidelines and suggestions that will help each instructor to conduct her/his class in a socially enhanced manner—introductions, sharing why content is of interest to participants, allow more time for discussion and sharing when possible. (Membership and or Programming committees).
   3. Initiate, where feasible, a practice of having refreshments after classes in order to have informal follow up discussion between class participants and the instructor
   4. Create new ideas and events that bring people together to discuss, learn, and share diverse social and cultural backgrounds and interests.
   5. Emphasize current Go Explore diversity experiences and assist in creating more (Curriculum).

Implementation of Action Steps
The Board of Directors and Executive Director have the over-all role of providing coordination and guidance for implementation of the strategic plan. All committee chairs will report at each Board of Directors meeting for review and approval of their accomplished progress toward the strategic planning initiatives, the challenges or barriers to accomplishment and the plans for future progress. The action steps incorporated into the Strategic Plan are uneven in specificity, some being much more specific than others. The Board expects that each area’s goals and strategies will be amplified by the appropriate committees to specify and explain the accomplishment of the areas goals.