

Strategic Plan

2023 - 2025

Introduction

This document sets out the mission, vision and purpose of University of the Third Age Redlands District Inc. (U3A Redlands). It identifies the goals that the Management Committee, on behalf of our members, are aiming for over the next three years, and how we intend to achieve those goals.

An analysis of the Strengths, Weaknesses, Opportunities and Threats (SWOT) of an organisation is a valuable tool for formulating a Strategic Plan. A SWOT Analysis of U3A Redlands is shown in Appendix A.

The composition of the Management Committee by specific responsibilities is shown in Appendix B, together with generic person specifications. Any organisation can only function as a stable and viable entity if one or more persons can at short notice step into the role of someone who leaves the organisation, either temporarily or permanently, due to taking leave, resignation, incapacity or death. Hence the issue of Succession Planning is covered in Appendix C.

This document has been prepared by members of U3A Redlands Management Committee. It is however intended to be owned by the membership as a whole and the Management Committee welcomes comments and constructive criticism from members.

U3A Redlands Strategic Plan

Mission

U3A Redlands exists to enhance the quality of life of the Third Age community in the Redlands District.

Vision

To be the leading volunteer provider of quality academic, recreational and social programs, providing lifelong learning for seniors in the Redlands District by sharing knowledge and life skills within a culture of friendship and generosity.

Purpose

- U3A is a mutual aid learning community organised by and for people in the Third Age of life to promote and strengthen positive ageing, wellbeing and social inclusion for all seniors,
- In accordance with Section 3 of the U3A Redlands Constitution, members are provided with volunteering opportunities and social interaction through the sharing of lifetime experiences,
- The Management Committee is committed to ensuring the sustainability of U3A Redlands District through membership growth, good governance, and sound financial practice.

Principal Three Year Planning Goals

1. Maintain U3A in a sound financial position
2. Establish an administrative centre which is more accessible to members, to ensure organisation viability and sustainability
3. Ensure that the administrative functions of U3A run efficiently

4. Provide a long-term base for teaching activities
5. Enhance the quality and breadth of the curriculum
6. Increase participation of members as volunteers, both tutors and helpers
7. Rebuild membership to pre-Covid levels and aim to increase to 2,000 by 2025
8. Improve communication between U3A management, tutors and members
9. Maintain cooperation with other volunteer agencies

The Management Committee will seek to achieve these goals by the following means:-

1. Maintain U3A in a sound financial position:-
 - by maintaining cash reserves to an amount equivalent to a minimum of three months operating costs,
 - by reviewing subscriptions annually and ensuring that they at least cover projected operating costs,
 - by standardising class fees, based on size, type and equipment
 - by ensuring that all members attending classes are financial
 - by maintaining a tight control on operating costs,
 - by seeking out opportunities for fund-raising and grants, including donations and bequests.
2. Establish an office more accessible to members, to ensure organisation viability and sustainability
 - by seeking support from community groups for available office space
 - by approaching representatives from all levels of government
 - by generating funds from grants, fundraising events, member/public donations
3. Ensure that the administrative functions of U3A run efficiently:-
 - by maintaining timely and accurate records in our U3A Membership Management System
 - by continuing clerical and system training of office volunteers,
 - by encouraging administrators, including Management Committee office holders to ensure succession planning,
4. Provide a long-term base for teaching activities:-
 - by pursuing a purpose-built administrative centre to include small classroom (s) and meeting room (s)
 - by seeking to negotiate long-term leases of existing premises in the Redlands on terms acceptable to U3A, including the adoption of Covid-safe practices
 - continue to explore opportunities to engage with other age-friendly volunteer organisations in the Redlands
 - by exploring the possibility of philanthropic donations to U3A to finance a dedicated home for U3A Redlands District.
5. Enhance the quality and breadth of the curriculum:-
 - by seeking feedback from U3A members about the curriculum and its delivery by undertaking occasional surveys,
 - by encouraging online versions of more courses
 - by providing training for tutors and other volunteers as required, including free video conferencing (Zoom) training
 - by seeking external speakers and tutors for requested new topics and short-term presentation series
6. Increase participation of members as volunteers, both tutors and helpers:-
 - by making volunteers feel that they are valued, by means of tutor forums, tutor and volunteer social events, and service longevity badges
 - by seeking out and encouraging members who can add value to U3A's activities,
 - by providing guidance for prospective tutors and other volunteers as requested,
 - by encouraging class participants to give positive feedback to tutors and their volunteer helpers.

7. Rebuild membership to pre-Covid levels and aim to increase to 2,000 by 2025
 - by running 'Come and Try' days to promote academic and recreational pursuits
 - by promoting U3A in local news and via social media
 - by ensuring activities are relevant and appropriate for all age groups in our demographic
 - by participating in seniors' expos in the Redlands,
 - by introducing new courses with points of differentiation from competitors,
 - by promoting U3A Redlands to medical practices and seniors' groups (e.g. RSL and local tennis/sporting clubs),
 - by encouraging members to bring non-member friends to a class on a trial basis,
 - by introducing a non-member price for U3A fundraising events.
8. Improve communication between U3A management, tutors and members:-
 - by using the inbuilt email in the Membership Management System to connect easily with all members,
 - by encouraging tutors and members to make full use of the Membership Management System,
 - by ensuring that e-mailing does not disadvantage members who have limited access to computers by providing hard copies of newsletters and other U3A documents.
 - by using bulk texting as another quick method to contact members
9. Maintain cooperation with other volunteer agencies:-
 - by attendance at Redland Seniors Network monthly meetings,
 - by regular contact with other local organisations for seniors, e.g. Redlands District Committee on the Ageing (RDCOTA), Donald Simpson Centre and Star Community Services
 - by regular contact with other U3A chapters,
 - by maintaining close links with U3A Network Queensland.

A SWOT analysis is a strategic planning model that helps organisations identify where they are doing well and where they can improve, both from an internal and an external perspective. SWOT is an acronym for 'Strengths, Weaknesses, Opportunities, and Threats.'

The SWOT Analysis in Appendix A was completed by gathering input from a Strategic Planning Sub-Committee workshop to facilitate the Strategic Planning Process.

Appendix A: SWOT Analysis

Strengths

- Part of a world-wide organisation, respected in the community, meeting a community need
- Viable organisation, financially solvent, fiscally responsible with previous success in applying for grants
- Service delivery at multiple venues throughout the Redlands District provides support to other organisations/businesses, as well as to members
- Administration: well-managed office, paid office administrator; documentation and policies
- The Membership Management System (MMS) accurately records membership and enrolment information
- The MMS provides timely statistics to measure organisation sustainability, which can be referenced in grant applications
- Communication: website, Facebook, newsletters, Tutor News, Bulk Email
- Management Committee: committed, appropriate and relevant skills

- Volunteers: dedicated skilled core volunteers - tutors, assistant tutors, office, catering, general
- Costs to members: affordable membership fee and low cost for courses
- Courses: wide range of quality programs
- Wellbeing for members: adult learning environment, social interaction, mental and physical stimulation, overall health benefits
- Support from: Cleveland District State High School, Mayor as Patron, Councillors, U3A Network Queensland, Hub 68, Department of Agriculture and Fisheries
- Links with other Seniors organisations – Donald Simpson Centre, RDCOTA, Redland Seniors Network, Star Community Services and Volunteering Redlands

Weaknesses

- No central home base
- Spirit: lack of community/collegial spirit among members
- No major external financial support, other than occasional grants; lack of substantial reserves to plan for future building needs
- Multiple venues, lack of certainty, time consuming to coordinate, alternative classroom venues need to be sourced, particularly since Covid restrictions
- Ageing demographic
- Courses: need to be attractive to 50 and 60 year olds
- Variation in prices of courses causes discontent
- Insufficient volunteer base – burn-out in long-serving volunteers
- Insufficient computer-literate volunteers
- Need to redress gender imbalance in Management Committee roles
- Technology challenges: Membership Management System –ongoing training required for new committee members and office volunteers. Some ordinary members still need encouragement to use the system.
- Wifi not readily available in many external venues for computer classes
- An imbalance in the geographic locations of activities with Redlands District

Opportunities

- Membership: increase numbers, untapped potential and skills, expand tutor pool, more technologically minded membership
- Nurture and value tutors and volunteers, eg forums and social events; provide training for prospective tutors and other volunteers
- Courses: new, relevant course activities; seek external speakers eg other U3As, collaboration with U3A Online and Council on the Ageing Queensland; run evening/ night/ weekend courses
- Improved communication between Management Committee, tutors and members
- Encourage members' social interaction with social events
- Ensure future sustainability through promoting the benefits of U3A Redlands District via local facilities eg health centres and libraries
- Grants to maintain and improve facilities and equipment
- Hub 68 makes meeting room available for Committee Meetings and small classes
- Relocate office and include a couple of classrooms: Government/Council support for vacant land; explore possibility of philanthropic donations; establish bequest fund
- Continue service delivery amongst multiple venues: Should a large facility have to close (during a Covid outbreak for example), some small classes could operate in small safe venues used by U3A Redlands.
- Expand U3A Redlands class offerings to cover all areas of the Redlands eg. Redland Bay and the Island Communities
- Pursue collaboration with other senior organisations for more classrooms
- Expand external partnerships

Threats

- Lack of accessibility at current U3A administration office is affecting custom
- Competition from similar groups eg Donald Simpson Centre; loss of identity
- Capacity for some classes (some are full)
- Loss of tutors, finding replacements
- Loss of venues
- Lack of sufficient volunteers; eg tutors, catering
- Failure to maintain quality and variety of course offerings
- Technology: keeping up with changes; technology failure
- Rising costs – venues, communication, supplies, wages
- Operational inefficiencies

Appendix B: Organisation Management

Committee Formation

- President
- Vice President
- Secretary
- Treasurer
- Tutor Liaison Officer (Academic, Humanities, IT)
- Tutor Liaison Officer (Leisure and Lifestyle)
- Office Coordinator
- Publicity Officer
- Newsletter Editor
- Catering Liaison Officer
- Projects Officer

Skill Sets for Members of the Management Committee

- Ideally, the Management Committee will comprise membership with a mix of administrative, financial, policy, marketing and creative skills,
- All persons nominating for positions on the Management Committee will be provided with a copy of the Position Description for the role for which they are nominating,
- When filling a casual vacancy the Management Committee will take careful consideration of the skill set required for the position that has been vacated.

Appendix C: Succession Planning

Reason

To plan for a full committee with appropriate skills to maintain continuous running of the organisation.
To plan for possible departure of long term paid employee and the ability to provide replacements with access to documented historic knowledge of organisation and processes.

Process

1. **Ensure valuable organisational information passed on to new committee members and staff**

- Document Policies, Position Descriptions and Committee Work book manuals
 - Document Computer Processes and Systems:
 - Rules and guidelines for hard copy Filing Systems
 - Index computer networks for filing of soft copy Filing Systems
 - Computer passwords centrally and securely listed
 - Document Intellectual Property – knowledge, methods, contacts, procedures and organisational memory of senior members
- 2. Recruit new people by a systematic method of recruitment**
- Committee Members Allow three months for recruitment process
 - Seek individuals with the skills or qualities needed to achieve your mission
 - Make candidates aware of what their role will entail and the commitment required
 - Invite potential committee members to meetings
 - Keep existing committee members updated on any developments
 - Set up processes for interim management by stand-in executives for however long the gap
 - Have formal plan for continuous uninterrupted operation should something happen to the President or other members of the Executive
 - Follow-up members who indicate a willingness in the future
 - Paid Administration Officer
 - Consult widely on organisational needs
 - Decide on selection guidelines and a search process
 - Assess applications for a shortlist of candidates evaluated by the Executive Committee
 - Conduct interviews with agreed questions and a panel of three (minimum)
 - Contact referees of the better applicant(s), before making a decision
- 3. Manage the induction process for new personnel**
- Committee Member

Prepare an Organisation Reference Folder to provide background of the organisation. This should include all or most of the following:

 - Mission statement and Strategic Plan
 - Constitution and By Laws (on web)
 - Policies Manual
 - Meeting Minutes for the past year (refer secretary)
 - Annual Report
 - Current Course List
 - A brief summary of sources of donations and grants
 - Current year budget
 - Contact details for committee members
 - A list of Sub-committees and their members
 - Newsletters for the current year
 - Association's current brochures and flyers
 - Paid Administration Officer
 - Job Description and Job Duties Work Manual
 - On the job training provided by outgoing employee (if sufficient notice has been received)
 - Access to above Organisation Reference Folder to provide background