

# STRATEGIC PLAN 2021 – 2025

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## **PURPOSE**

The purpose of U3A organisations world-wide is to enhance the life of the Third Age community through connecting seniors to lifelong learning.

## **BELIEFS**

- Lifelong learning contributes to a good quality of life.
- The Third Age is a special period of life with opportunity for continued learning.
- An active mind and body moderates the aging process and maximizes the quality and duration of life.
- Sharing knowledge expands capacity.
- When we listen respectfully to others, we learn from them.
- Volunteering time, knowledge and skills enhances well-being, as well as the well-being and joy of others.
- Learning in the company of others develops friendships.
- Working together as focused teams creates a vibrant and attractive organisation.

## **MISSION**

Create a culture to support and encourage members to improve their well-being through exercising their minds and bodies and to see U3A as an integral part of their life helping to achieve personal goals and ambitions.

That U3A has systems and processes in place which are both effective and efficient and the records kept are compliant with the legislation for not-for-profit organisations.

Create a self-sustaining organisation with an energetic membership, far-ranging programs and a sound financial base.

## **STRATEGY**

**Membership Strategy – strengthen members’ involvement in planning and conduct of the organisation and retain or increase membership to 500 by the end of 2022 and 600 by end of 2023.**

### **How:**

- Involve our members in choosing activities and learning opportunities (following up on new members preferences and surveying existing members).
- Ensure all members agree to a Code of Conduct – via membership application and renewal.
- Implement our Promotion Strategy.

**Volunteers Strategy: Encourage all members to volunteer their time and their expertise:**

### **How:**

- Have as many as possible of our members engaged in the conduct of our activities (committee, facilitators, tutors, record keepers, maintenance of facilities and equipment, event organisers, administration tasks and other ad hoc needs of the organisation).
- Provide development and training for our volunteers.
- Develop succession plans for key positions on the committee.

**Programme Strategy: Conduct programs which are appealing to our current members and are in line with the needs of potential members:**

### **How:**

- Conduct 35 programs a week by the end of 2023, under the following categories:
  - Activity and social learning
  - Creative Learning
  - Financial management learning
  - STEM learning (Science, Technology, Engineering and Math).
  - Humanities learning
  - Regular lectures with are eclectic in nature and have a wide appeal.
  - University Studies in partnership with JCU.
- Identify individuals and groups who are willing to voluntarily share their knowledge.
- Develop programs in emerging disciplines (Modern technology, medical advances etc).

**Compliance Strategy: Document and implement systems and processes that are compliant with the legislation.**

**How:**

- Educate our committee and others about the legislation through training.
- Create and implement an operational manual
- Have an annual audit of our Financial Statements, further to our Financial Strategy.
- Manage our records as required by legislation
- Implement our Promotion Strategy.

**Promotions Strategy: Raise recognition for our brand and what we offer – lifelong learning.**

**How:**

- Conduct periodic open days (minimum of one per year)
- Maintain promotion initiatives
  - Seniors Expo
  - Occasional information stands at malls or other events.
- Conduct a 'bring a friend' campaign through existing members.
- Maintain and build relationships with community leaders and media outlets.
- Maintain and enhance our promotional material.
- Investigate, or adopt, other channels of communication with existing and potential members (e.g., enhancing the capability of our website).
- Implement membership strategy initiatives.

**Finance Strategy: ensure that we conduct our business with sufficient income and retained earnings for current needs and maintain the organisation in sound financial position.**

**How:**

- Encourage our members to recognize that all our classes have a value and people need to contribute.
- Establish a 'Grants and Sponsorship' team headed by a committee member to apply for money from a variety of government and non-government organisations.
- Set aside/quarantine funds sufficient for the continuing upgrade of our computers and other equipment.
- Create a reserve of three years running costs (approximately \$45,000): this will be done incrementally over time, aiming for \$45,000 by the end of 2023. This will ensure we

have sufficient money to meet our fiduciary obligations under the legislation and protect current and future office bearers.

- Implement Compliance Strategy annual audit and passage of all financial transactions through U3A accounting system.

**Office and Equipment Strategy: have a well-equipped office as well as meeting and training facilities which are sufficient for our current needs and the foreseeable growth of the organisation.**

**How:**

- Open our office daily during the week, at times advertised.
- Ensure that our office equipment is of a standard that is aligned to our current and foreseeable needs.
- Upgrade the website to allow for our members to interact directly with the organisation.

**Maintain a positive relationship with U3A Qld and consider the advice and support they offer to our branch.**

**How:**

- Encourage a local committee member to apply for a Qld committee position and contribute to the flow of information.
- Participate in the U3A Qld arrangements of securing suitable insurance cover for our Branch.
- The President to maintain a presence within the Presidents group emails

**COVID**

**As required maintain an active understanding of all appropriate health advice pertaining to Covid 19 to contribute to the health and safety of our members.**

**How:**

- Have a committee member with the interest and skills volunteer to undertake a 'watch and advise' role.