



Bayside U3A

Strategic Plan

2019 - 2023

ABOUT THIS PLAN

This strategic plan has been developed from a forum comprising tutors, volunteers and members of the management committee conducted at Milano's Brighton in October 2018. It draws on, and is an extension of the prior strategic plan for 2014-18, which has been well implemented, and progressively updated over the plan period to reflect both the progressive achievements of the organisation and also the changing environment.

This plan continues the overall strategies and direction pursued to date, but also incorporates the lessons learned and assigns new priorities in light of the evolving market for our services and also the maturing relationship the Bayside U3A has with official and private stakeholders in our city.

It is a plan for growth whilst consolidating the gains to date and seeking more efficiency of operations.

By virtue of experience there is greater knowledge of operational challenges and of the true potential for membership growth, together with the competitive forces confronting the organisation. The topology of local and broader support networks and the context in which we operate is also better known. All of these form the basis of the proposed strategies and tactics to be employed over the coming four year period.

The plan does not envisage any changes in the established mission and vision of Bayside U3A. but there are substantial changes in our assessment of the marketplace environment, and in the objectives, tactics and actions we plan to take over the next four years. The plan will be reviewed annually against benchmarks and will be amended as necessary to cope with changing funding and operational constraints

CONTENTS

- What is the Bayside U3A?
- Mission Statement
- Vision
- SWOT Analysis
- The Path for Bayside U3A
- Strategies and Tactics

WHAT IS BAYSIDE U3A?

Bayside U3A is a learning, social and recreational group primarily for seniors in the Bayside and nearby catchment areas. It provides a sense of fulfilment, belonging and credibility to its Members, offering mutual support, event management, good governance and leadership. It offers guidance but does not dictate the way that individual tutors run their classes. BU3A also manages the U3A brand in Bayside as well as its many stakeholder relationships such as with the Bayside City Council, the U3A Network, and Victorian Government.

OUR MISSION

To work constructively with the Bayside community to promote lifelong learning and social interaction amongst our members in a healthy and active retirement. To maintain, share and develop our skills with each other in an equal and voluntary capacity while ensuring an affordable, safe, and stress-free environment.

OUR VISION

Bayside U3A aims to be a leading provider of affordable educational, recreational and social programs for all Bayside and district seniors.

SWOT ANALYSIS

The recent review analysed both the past strengths and weaknesses identified in the 2014-18 plan and also assessments of the current environment Bayside U3A faces. On this base, we then overlaid our expanded capabilities and financial base, the developed stakeholder and market relationships achieved over the past four years, and our much-evolved operational capacity. From this a new expression of our strengths and weaknesses emerged. A consideration of these allowed numerous strategies and operational directions to be identified.

Internal Qualities as We See Them	
<p>STRENGTHS</p> <ul style="list-style-type: none"> • Strong demographic market potential in Bayside City and environs: current relatively low penetration rate of 8% of local target market; • Consistent growth of annual membership to 1350 members in late 2018; • Membership is good cross-section of established village communities/suburbs, and is not dominated by one suburb; • Relatively low attrition rate of members at around 20% annually; i.e. high retention rate; • Procedures in place to measure member satisfaction, and reasons for discontinuing; • High-quality and dedicated Committee with good internal administration structures • Wide variety of curricula and high number of courses regularly available (in excess of 110 in 2018); perceived dedication of tutors to ensure the best of offerings; • Higher education levels in target Bayside population; plus perceived high propensity to pass on experience = good quality tutors; • Growing profile of the organisation amongst city residents, local media, community sectors, and potential partners and sponsors in the corporate, civic and private sectors; • Strong financial position and operational business plan formula (\$ in Banks); • Affordable membership fees –competitive with local commercial courses, and with other U3As; the Bayside U3A ‘product’ offers considerable value for money; • Successful record of applying for, winning (and appropriately acquitting) financial grants; • Management transition procedures in place; • Good networker record with partner organisations such as HSC, BCC,; • ‘dedicated’ BCC liaison, BCC relationship and BCC positive, supportive attitude; 	<p>WEAKNESSES</p> <ul style="list-style-type: none"> • Dependent on others for accommodation – venues and spaces; • Absence of an office and course accommodation in the centre of the city –in Hampton or Sandringham; • Limited office hours for administration; • Physical constraints and inadequacy of some spaces on office administration – (Beumaris-disconnected office), and other venues (toilets, chairs); • Lack of public transport to some venues; • Increasing difficulties with parking around major venues; • Full accessibility for some venues & facilities (e.g. disabled toilets etc.); • Relatively low profile and awareness of the U3A within the city and residents; • Absence of U3A street signage for major venues; • Inordinate dependence on some strongly followed (popular) courses and individual tutors; • Concentration of specific types of courses -- high demand for courses which are cheaper and reflective of outside commercial courses; • High degree of people management skills required in office administration; office volunteers often require training in operations and people management; • Maintaining volunteer ‘supply’ from membership to Committee and key positions; • Reluctance of older members to volunteer coupled with predominance of this group; • Matching courses to market demand; • Strong gender imbalance in membership; • Keeping abreast of grant opportunities • Maintaining marketing expertise and momentum of publicity is difficult in light of costs of marketing, and volunteer

<ul style="list-style-type: none"> • Enthusiastic and growing administrative volunteer base, together with evolving capacity to manage and train; • Established offices in North and South of city provide stronger customer servicing and increased local relevance; • Competent administration and membership servicing subject to volunteer limitations; • Strong policy development and management procedures in place; • Appropriate committee and sub-committee structure in place; • Growing local awareness of strong brand name; • Well-regarded Website; currently underutilised; • Established communications channels with members e.g. newsletter, e-bulletins; • ‘Coherent’ community and village- like structure of Bayside City allows for multiple venues and duplicate courses; • Strong contributor to the U3A Network in support of canvassing and positioning activities of that lead body; • Good reputation for delivering on what’s promised on joining; 	<p>availability;</p> <ul style="list-style-type: none"> • Inadequate knowledge of member capabilities and experience base (and potential as tutors); • Absence of well-oiled procedure for soliciting tutors from membership base, and from outside; currently an ad hoc process; • Need for better feedback from tutors as to course problems, interactions with members, changing requirements and attributes of members, ways of improving courses; • Building resentment and envy of other organisations in Bayside as to perceived success/growth of BU3A; • Limited management transition procedures in place for some key positions; • Volunteer nature and structure does not allow a guarantee of meeting what’s been promised; • No on-line enrolment to date; • Vulnerable key positions of Office Manager and Course Convenor • Absence of cost, means members may lack commitment to finish courses or keep attendance up; course “ghosting”;
Outside Environment - as We Perceive We can Relate to It	
<p>OPPORTUNITIES</p> <ul style="list-style-type: none"> • Aged care Royal commission offers U3As opportunity to showcase capability and contribution to sector and overall health of population; • More classes distributed throughout city to improve accessibility and relieve pressure on parking in high density locations; • Scope for better persuasion of members to volunteer and participate in running the organisation; • Proposed Hampton Hub and other Council re-developments in Sandringham offer potential for additional venues and growth in 	<p>THREATS</p> <ul style="list-style-type: none"> • Possible changes in government attitudes at all levels; changes in attitude from positive to negative or less supportive may curtail venues, increase costs, slow progress; • Our capacity to cater to a burgeoning market as baby-boomers retire over the next decade; more sophisticated requirements for leisure in this group; • Likely economic correction of major proportions will have unknown ramifications; it may be ‘positive’ or negative for U3A actions; • Excessive expectations of potential new

<p>longer term; of especial benefit would be built-for-purpose venues</p> <ul style="list-style-type: none"> • An improving website will allow better feedback about courses, and subsequent refinement; • Liaison/interaction with other U3As; increased use of U3A Network resources and capabilities with respect to cross-fertilization of courses and other activities; • ‘Affiliation’ and loose joint operations with other ‘like’ organisations in Bayside may allow larger scale/more costly activities such as regular bus excursions or special interest outings; • Size and continuing growth gives scope for taking a more pre-eminent role in cultural fabric of Bayside, and sponsorship of events or competitions in particular fields; • Course/tutor evaluation and training opportunities (like ‘open’ or enrolment day) • Financial strength can be leveraged to develop longer-term opportunities in technological and recreational fields such as virtual reality, new gaming etc.; • Strengthen the course development function within the committee to encourage new and better courses and provide on-going advice to prospective tutors; • Improve course descriptions and tutor CVs • Expand timetables of courses so as to broaden market appeal or cater to tutor schedules, such as evening or weekend, or retreat classes, or to make use of restricted time venues; • Find alternative and extra venues throughout the city; • Scope for joining with/leading other organisations (LAC, Seniors, Metro, BCC, commercial operators, service clubs,) to improve physical access to U3A venues for individuals through mini-bus services connecting major hubs, venues, stations, aged-care, commercial centres within/nearby Bayside; • Find a high-profile and socially dependable Patron to legitimize, smooth way for the 	<p>members (e.g. new seniors – baby boomers)</p> <ul style="list-style-type: none"> • Competition from other organisations and from the large range of activities already available to Baysiders; • Competition from gaming, massive expansion of availability for on-line courses , and new leisure in all forms; • Competition from changes in social structure and increasing demands on grandparents for child-minding duties; • Growth in preference for on-line learning by market segments traditionally within the U3A target sector (such as newer retirees more familiar and skilful with on line activity); • Cost limitations on Bayside U3A capacity to market; eg advertising is expensive; • Inability to craft new courses able to off-set the gender imbalance; • Potential to get too big for volunteer nature of organisation; attracting envy and irascibility of other local organisations; • Being perceived by the market, other groups, and corporate sector as a child, creation, or favoured functionary, of the BCC; • Inability to continue momentum of support from members to take on key volunteer roles; • Increasingly becoming a potential target for those seeking commercial exposure locally; • Hacking of data-base or hi-jacking of systems; privacy concerns; lack of appreciation for security needs; • Over-reaching our resources and trying to grow too quickly; ignoring the real depth available to the organisation; • Inadequate succession plans and excessive workloads for key personnel such as Course Convenor and Office Managers; need to provide more resources in some (short-term non-productive) areas; • Hampton Hub proposals by BCC may incur substantial expenses for U3A; our support and involvement requires continual evaluation and preparation; level of commitment needs to be measured in light
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<p>organization;</p> <ul style="list-style-type: none"> • Increased liaison with political representatives at all levels of government; • Greater emphasis on increasing and improving regular social events as ‘courses’; e.g., dancing and gaming courses; further leveraging existing courses to increase their sociability aspects; • Participation in all local seniors promotional events etc.; • Additional activities with private sector and solicitation of sponsors for specific courses or social activities; • Opportunities for closer interaction with local universities for specific courses, development of new courses, tailoring to particular market segments; • Plethora of new on-line resources available for course development, for borrowing/buying/renting, or enhancement to make suitable for local market; • Improving U3A knowledge of our market’s demographics and needs, to improve marketing and product/demand matching; • Need for additional support for volunteers in office and tutors; • Can make website more user-friendly and responsive quickly to changes; • Scope for U3A sanctioned and supported special events; • Increased short-duration events, and semi-commercial activities like tours, bus excursions, concerts etc. to be listed and conducted as courses; • Increasing marketing profile via groups such as health professionals, hospitals and clinics waiting rooms, symbiotic organisations such as gyms; • Increasing market exposure of BU3A -- more advertising, letter drops, raffle sales, promotion at markets/events etc; low-key true publicity, assisting there organisations • Improving administration of courses to maximize efficiency of attendances, and equitable allocation/spread of courses through the membership 	<p>of adopted ‘federal’ model of operation;</p> <ul style="list-style-type: none"> • Encroaching complacency and non-responsiveness of organisation through ageing membership, if diversifying measures do not achieve change in breadth, depth and gender makeup of membership; • Ageing membership to frighten off new and younger members; different generations have different expectations; loss of voluntary ethos; • Damage to existing major venues and equipment and ensuing inability to use for some time, due to mis-use of equipment, accident or problems with sub-lets; • Loss of skilled and popular tutors and courses to commercial sector, or other clubs;
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A PATH FOR BAYSIDE U3A

Our competition can loosely be considered all the **alternative avenues for spending time** enjoyably both within the city and nearby accessible environs. In Bayside, these alternatives are considerable, as social and connective infrastructures are strong, the market is discerning, physically active and affluent, the natural environment pleasant and accessible, and there are many groups and facilities. We have grown out of community and council efforts and the close relationship we have with Council and other elder-servicing bodies is both natural and beneficial to our local society. Bayside U3A must **not seek to grow at the expense of other local social or private organisations**, many of which have a considerable history and strong relevancy. **Nor is there value in striving for growth for growth's sake.**

Our overall best strategy is to **make our operations smooth and sure**; to **assist others** where we can to be better at what they do and offer, and make the overall opportunities and systems for the elderly within Bayside **more efficient and better matched** to the variety of markets. This has been our **natural strategy** to date and there is every reason to **continue** the overall thread and direction. Consumers now believe it's very **important for any corporate to be transparent**, and make it a point to know more about the companies they buy from. It's obviously different for a volunteer organisation, but only a matter of degree. People generally are searching for **more ethical, sustainable, meaningful consumerism** (and this includes where they commit their time) which takes into account the negative impacts our consumption may have on planet, society and health. Many see themselves as instantly and directly connected to everything they need to know and consequently have **inflated views of their smarts**. But this also means that any group doing business or providing services needs to be **ready with a cogent and true message** of how its operation fits their world –view.

Much more day-to-day life is being captured in real-time video or livestreamed, or being commented on at a superficial level, even by the older groups of our market. We can expect that some of this behaviour will spill through into those people wanting to use U3A services in the coming half decade. Over the next half-decade, the **radical transparency occurring throughout our society** –in consumer awareness, activism, competition, and social media -- conceivably could **turn our little Bayside U3A 'brand' into a glass box**. It's likely the trends of the past decade aren't ephemeral, and we should accept that our internal culture and workings will be increasingly public and more scrutinized—even though, or especially because, it is volunteer based. There's a complex bunch of associations, feelings and expectations comprising our brand, so prudently we should devote some resources to anticipating the trend and channelling it to our advantage. How?

Our local U3A culture is very formative, and operations are not perfect – they’re still under development – and no doubt they’ll evolve further. But considering its volunteer nature, so far our performance has been good by any objective measure. Nevertheless, we can **pre-empt problems by emphasizing procedures and protocols** and minimizing the need for personal intervention in the management, finances, and administration. This means **investment in systems and training**, and streamlining procedures.

Responding to the likely increased transparency, we need to **make innovative changes to our internal culture, and as is typical now, tell the world – very effectively** - the story of that journey. Our clients/members and volunteers don’t expect ‘us’ to be perfect, but they do have expectations of reasonable performance and efficiency which relate to socio-demographics, what’s available elsewhere, and varying senses of entitlement. We **need to be seen to be moving in the right direction** – both within, and publicly.

In the next four years, the **story of how Bayside U3A** is evolving can itself become a useful external **marketing asset**—in addition to the extensive range of courses we offer. Any positive cultural or operational changes, must be communicated effectively outside, so that each story becomes **part of our brand**—and making prospective members, corporates, and the public want to engage with us. If our ‘service and product’ is the cheapest, best, most comprehensive, deepest, most convenient, most fun, most sociable, and /or most effective, then we’ll still engage with our markets, and maintain reasonable growth. Improving our transparency and operational efficiency will be added bonus.

We should **never lose sight of our voluntary credo**, and that must inform our goals and style of operation. Doing what we do must be fun and **rewarding for everyone**; the U3A is a social connector and facilitator—and despite its name and aspirations to present high-value learning opportunities, it’s not a learned institution.

Another factor is the **connectivity of individuals and the acceptability of instant and shallow spectrums of analysis**. These are pushing **massive changes in the perspectives of consumers**. Most evident with younger markets, it’s also a (lesser) feature of those in the work-place due to retire soon or be made redundant by automation within the next ten years or so. *[McKinsey & Co have calculated that globally, the adaptation of currently demonstrated automation technologies could affect 50% of the world economy, or 1.2 billion employees and USD 14.6 trillion in wages over the next two decades. Most of the change may, paradoxically, occur in advanced Western societies.]* Growing insecurity over curtailment of real jobs, rising inequality in many countries, ruptures in local social fabrics caused by globalization, the nagging unsurety of climate change and population pressure on our environments, and in Australia, an artificially induced extended period of economic

‘expansion’ (i.e. no economic correction to foster reconsideration of real values)... all seem to be making **consumers more concerned for the “social good.”**

All ‘brands’ are expected to minimize any negative impacts from their operation and try to build a better future: i.e. an **internal culture that prizes ethics and sustainability**. Bayside U3A needs to have a ready (Instagram++ -ready) story of our corporate identity and ethical values.

Taking our internal situation and likely future environment into account, our future focus of the organisation for the planning period becomes clear. We have many persistent and effective strengths and natural advantages. Some of **our perceived weaknesses stem from our initial rapid growth** outpacing our administrative capability to keep abreast. To date some identified weaknesses are perceptions of insiders of what might or should or could occur. And yet, the high membership satisfaction with Bayside U3A, and its sustained growth, come from our **continued delivery of good experiences**, entertainment, sociability, and recreation for the membership—all **with a minimum of cost and fuss**.

There is a clear need to **continue developing operational efficiency** so our handling of members – recruitment of tutors, course structuring, and allocation of students to courses – consistently improves. As well, we are reliant on the skills, energy, enthusiasm –**the *esprit de corps***- of our key volunteers and in this plan period we must ensure there are back-stops and security for them –with all positions getting technical and personnel assistance to relieve work-loads and keep the BU3A a fun thing.

Strategic Objective 1 Building operational efficiency in administration

TACTICS:

<i>Objectives(Action/result required)</i>	<i>Tactics (steps or actions needed to reach or support the Strategy)</i>	<i>Date for completion</i>	<i>Responsible</i>	<i>Collaborators</i>
Improve efficiency and administrative procedures in all Committee meetings	<ul style="list-style-type: none"> • Increase use/responsibility of sub-committees for specific areas and special projects ; • Devolvement to sub-committees of detailed consideration of matters prior to exposure to COM, or as referred to them by the executive; • Improve oversight of sub-committees by executive; • Reports to Committee to include recommendations/motion/ scope /required budget for actions proposed; • Update position descriptions for committee and sub-committee members and for volunteers positions –and disseminate; encourage reciprocal and understudy service; • Written reports to be received prior to meetings; quotes/costs noted • Other Business to be advised prior to meetings; • More discerning re selection of committee members—look for specific skills, high commitment; • Development and adoption of meeting behaviour code; 	2019 +	Com	
		“	“	
		“	Executive	
		“	S-Coms	
		“	OTL/CC/Com	
		“	S-Coms	
		“	Com	
		“	P&G S-C	
Improved policy formulation, strategic planning, and succession planning for committees and office-	<ul style="list-style-type: none"> • refinement of existing sub-committee structure to provide for:- <ul style="list-style-type: none"> ○ Planning/ Legal / Governance S-C (P&G) ○ Membership/ Marketing S-C (M&M) 	2019 +	Com	

<p>bearers...</p>	<ul style="list-style-type: none"> ○ Grants/ Funding/ Finance S-C (G&F) ○ Facilities/ Developments S-C (F&D) ○ Courses/Programs S-C (C&P) ○ Radio/Entertainment S-C (R&E) <p>Each responsible to a member of the executive and with several COM members on each S-C</p> <ul style="list-style-type: none"> ● Advertising within newsletters for potential committee members with particular skills; ● Creation of policy/protocols handbook for members of committees ● Creation of a register of past and current skills /interests of Committee members ● Policy planning is to be a function of new Planning & Governance sub-committee (amalgamating legal, planning and auditing); inputs to be sought from across the board ● Strategic plan review annually (Oct) unless required earlier (by P & G Sub –Com) ● Visit larger U3As for advice on how to manage size; work with Network and build on their resource/fund raising 	<p>“</p> <p>“</p> <p>“</p> <p>“</p> <p>“</p> <p>“</p>	<p>“</p> <p>P&G S-C</p> <p>Com</p> <p>Executive</p>	
<p>Improving induction of committee and co-opted sub-committee members</p>	<ul style="list-style-type: none"> ● Handbook /procedures manual (above) ● ‘Mentors’ appointed for new sub and Committee members ● Regular “get to know your U3A” functions (Qly) for current and prospective Committee members and interested members ● Training for members of office equipment 	<p>2019 + 2019/20</p> <p>2020 +</p> <p>2019 +`</p>	<p>P&G S-C Com</p> <p>Com</p> <p>Com</p>	
<p>Improving communication</p>	<ul style="list-style-type: none"> ● Summary of deliberations of sub-committees/COM 	<p>2019 +</p>	<p>M&M S-C</p>	

<p><i>within administration offices and between all management and membership</i></p>	<p>to be published in news- letter</p> <ul style="list-style-type: none"> • Increased use of executive to visit courses, venues, offices to be seen and see activities • Appointment of a membership officer for Committee – functional areas of M &M S-C –with mandate to service members, act as connection, • Suggestion boxes in BSC and BCH • All publications to encourage feedback • Encouraging exchanges of volunteers between BCH and BSC • Improving induction of volunteers through better task descriptions, making professional training available if required, more detailed orientation of COM and U3A activities; building <i>esprit d' corps</i> • Provision of additional support to Office Manager with dedicated 'branch' manager positions for BCH and BSC offices • More ad hoc training by Office Manager/OTL 	<p>2019/20 2019</p> <p>“</p> <p>“</p> <p>“</p> <p>“</p> <p>“</p>	<p>Com Com</p> <p>OTL M&M S-C OTL</p> <p>OTL/Com</p> <p>OTL/Com</p>	
<p><i>Incorporating more technology in administration and operations</i></p>	<ul style="list-style-type: none"> • Increase use of Dropbox, on-line enrolments, and for management of own member accounts; • Use of website for course proposals, suggestions for speakers, feedback and suggestions and complaints; • Recruit additional support for Webmaster • Encourage tutors to enhance their courses via new presentation forms/equipment • Include availability for training and integration to digital communications on physical enrolments and all member contacts; 	<p>2019</p>	<p>P&G SC</p> <p>C&P SC</p>	

	<ul style="list-style-type: none"> • Liaison with other bodies encouraging integration and digital take-up by older populations • Fostering demonstrations of new technology for members and the public 			
<i>Providing additional volunteer or paid support for key activities or where specific projects warrant</i>	<ul style="list-style-type: none"> • Identifying expertise areas essential for the organisation –in marketing, PR, technology, liaison, tutor or volunteer training, special projects, • Creation of project budgets, action plans, oversight as required • Securing grant funds as necessary • Ensuring tutors are not out-of-pocket for reasonable expenses in creating and presenting courses 	2019	All SCs G&F C&P	
<i>Creating a “thank-you culture” for all volunteers within the organisation</i>	<ul style="list-style-type: none"> • Participate in Volunteers Week and other celebrations /support for volunteers • Regular exposure of volunteers in communications; volunteer stories • Create better name badges and recognition for long service • Create budgetary item in accounts for the value of services provided by volunteers so as to best measure contribution –for PR and Council/government relations • Create office environments conducive to best interaction with members • Make physical changes and alterations to office premises and environments to ensure volunteers are accorded courtesy and protection in their 	2019	M&M G&F P&G? P&G	

	dealings with members and the public			
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Strategic Objective 2 Building better Courses

TACTICS

<i>Objectives(Action/result required)</i>	<i>Tactics (steps or actions needed to reach or support the Strategy)</i>	<i>Date to be completed</i>	<i>Responsible</i>	<i>Collaborators</i>
Facilitating better presentations and courses using latest (but manageable) technology	<ul style="list-style-type: none"> • If requested, assisting tutors construct courses with professional advice for content and presentation; • Liaising with local or nearby tertiary institutions for part attendance at their courses for U3A members; and other potential academic and occupational links between classes of U3A and the institutions; 	2019 +	C&P	
	<ul style="list-style-type: none"> • Create a new position of Course Development Officer to assist the Course Convenor with liaison with tertiary bodies, libraries, venues, corporates and other orgs etc. • Utilize and purchase online sources of professional educators where these are available and can be modified to the U3A format; make these available for local presentation; • Seek membership input and help in setting up technical courses in modern technical fields such as modern gaming, virtual reality etc. to meet new and projected market demand; • Directly approach to local (non-member) experts to teach their experience; • Include course development as subject for grant applications, especially for potential members with 	2019 +	C&P	

	<p>limited /disabled access, or where the courses are non-mainstream;</p> <ul style="list-style-type: none"> • Measuring attendee feedback and satisfaction levels during and/or at the end of the courses; • Improving flexibility of course timing by extending course hours to week-ends, early hours, evenings, and school holidays, if support exists; • Identifying skills of members at enrolment/joining ; early approaches by dedicated volunteers and mentor support during course creation; • Culling courses which are not supported or where tutor standard is inadequate; • Following up courses weekly to ensure attendances are maintained and tutors are appraised of changing levels of support; 			
<i>Improving the induction and training of presenters;</i>	<ul style="list-style-type: none"> • Regular updating of Tutors Handbook • Quarterly mentoring sessions for tutors desiring same • Identifying courses BU3A wishes to prioritize (in terms of demand) • Canvass with tutors how their courses might be duplicated or extended beyond their own course, through (say) training another trainer, deputizing a valued student as understudy; • Providing constructive feedback (gleaned from attendee research) to tutors 	ongoing	C&P	
<i>Emphasizing the sociability aspects of membership and courses</i>	<ul style="list-style-type: none"> • Creating additional functions available to the whole membership , such as group bookings for concerts, galleries, regular bus excursions, smaller tours to domestic and international destinations, events such as 	2019 +	M&M C&P	Tutors, Com

	<p>Melbourne Cup, top-line speakers programs, car rallies, dances</p> <ul style="list-style-type: none"> • Where possible facilitate the efforts of others –especially tutors –to extend aspects of their courses to incorporate a social aspect • Posting pictures of tutors and course descriptions on walls of venues • Introducing new activities catering for a city-wide market (not restricted to U3A specifically) run in conjunction with other groups and perhaps BCC • Progressively devise strategies to improve accessibility to all classes 			
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Strategic Objective 3 Increasing Membership to a sustainable 2000 members by 2023

TACTICS

<i>Objectives (Action/result required)</i>	<i>Tactics (steps or actions needed to reach or support the Strategy)</i>	<i>Date to be completed</i>	<i>Responsible</i>	<i>Collaborators</i>
<p>Formulation of a marketing plan for four years Incorp:</p>	<ul style="list-style-type: none"> • Preparing annual mainstream brochure outlining courses (or with a course insert) for distribution through doctors, dentists, pharmacies, special events, Council, all Venues, ‘member get members’, ++ 	<p>annually</p>	<p>M&M S-C</p>	<p>COMM</p>
	<ul style="list-style-type: none"> • collaborating with other bodies in Bayside for joint programs/events, and in promotions, social activities 	<p>ad hoc</p>	<p>M&M S-C</p>	
	<ul style="list-style-type: none"> • Creating a new, clearer Bayside U3A identity for greater visibility and an umbrella image including new logo, positioning statement 	<p>2022</p>	<p>M&M S-C</p>	<p>COMM</p>
	<ul style="list-style-type: none"> • Engaging a part-time publicity/marketing agent on a project basis for soft editorial, advice, elevate general profile, PR; 	<p>2020 2019 +</p>	<p>M&M S-C COM M&M S-C Course</p>	

	<ul style="list-style-type: none"> • Expanding demonstration class opportunities; seniors week, Try-Outs, open days • Devising promotions using the existing membership base; e.g. every member get a member/bring a friend, localised drops of self-printed leaflets • Letter drops, competitions, attendance at craft and Rotary markets, booths at special events, street stalls, publicity stalls at Southland Shopping Centre, etc • Special promotional “streams” such as a High Profile Speakers Program, expanded Community Radio presentations • Undertaking additional research to the extent that BU3A becomes major repository of data on the elderly market in Bayside and possibly similar areas of Melbourne 	<p>2019 +</p> <p>2019 +</p> <p>2019 + 2020 +</p>	<p><i>Convenor</i></p> <p><i>M&M S-C</i></p> <p><i>M&M S-C</i> <i>M&M S-C</i></p>	
<p><i>Boost community presence and opportunities for BU3A to communicate directly to broader audiences</i></p>	<ul style="list-style-type: none"> • Establish a regular community talk-back, or discussion program to give BU3A courses publicity and expose tutors’ capabilities and diversity • Incorporate radio compering and interviewing techniques as a BU3A course offering, and train multiple presenters • Over time expand the BU3A program to become weekly or fortnightly and longer sessions to provide a stronger corporate and persuasive voice • Introduce a high profile BU3A-sponsored speaker program using quality venues and entertainment to elevate corporate/ community positioning • Make the speaker program a regular feature of the Bayside cultural calendar through active marketing • Secure a grant to cover costs of a program which yields considerable WOM promotional exposure for U3A plus provides opportunity for platforming the organisation 	<p>2019 +2023</p>	<p>R&E S-C</p> <p>R&E SC</p> <p>M&M?</p> <p>G&F SC</p>	

	within the community and various academic' circles'			
<i>Upgrading marketing capabilities</i>	<ul style="list-style-type: none"> • Soliciting additional members of M&M SC with specific marketing expertise • Obtaining guidance and action from (paid) external and professional marketing resources for specific promotions, advice, • Boosting research through securing grants for professional research to Identify leisure/education/recreational needs of prospective and current members (i.e. of the elderly market in Bayside and nearby) via focus groups, omnibus survey inclusions, data mining of existing research • Securing feedback from students on courses using Melbourne U3A models, and class questionnaires; • Canvassing opinions and feedback from past students • Comparisons of costs of relative training and activity programs within Bayside 	2019 +	COM M&M G&F C&P	
<i>Building a membership more equal in gender and younger than the existing median age of 73 years</i>	<ul style="list-style-type: none"> • Soliciting younger members to the Committee and sub – Coms • Identifying through research what younger retirees like and soliciting new tutors from this group • Specifically targeting new courses for men • Creating partnerships with health and social groups to broaden the U3A resource base to market directly to younger and older men 	2019 +	COM	Executive
<i>Maintaining accessibility for all ages, at most venues</i>	<ul style="list-style-type: none"> • Liaising with Council re specific issues raised or occurring at venues 	2019 +	F&D	

	<ul style="list-style-type: none"> • Highlighting ease of access in choice of venues • Taking physical accessibility into account when considering enhancements of any U3A venues • Extending U3A programs to aged care facilities, especially those catering to those with limited mobility/capability through appropriate technology; Skype, intranets, etc • Consider preparing special 			
<i>Minimizing member turnover</i>	<ul style="list-style-type: none"> • Personal contact with all non-renewing members to identify reasons, solicit testimonials • Obtaining on-going feedback from members as to class satisfaction levels • Establishing a testimonial bank where members can record their appreciation of individual courses and tutors • Addressing problems of waiting lists for high-demand classes • Being more efficient with enrolment processes -- to advise prospective members of bottlenecks in classes; improving the existing system 	2019 +	M&M	
<i>Improving social media exposure</i>	<ul style="list-style-type: none"> • Appointing additional volunteers/resources to specific responsibility of updating BU3A posts, and encouraging members' use • Upgrading the BU3A website regularly • ensuring social media content and coverage is favourable by boosting commentary and interaction levels 	2019 + " "	M&M S-C " "	COMM
<i>Building a professional library of marketing and teaching resources</i>	<ul style="list-style-type: none"> • Starting an archive for BU3A –history, plus visuals, publications, teaching resources (DVDs CDs, papers lists of links etc) to back-up tutors and COM 	2019/20 +	P&G S-C COM	COMM

	<ul style="list-style-type: none"> • Liaising with Network for a broader common base resource to be supplemented by local flavours • Additional actions as required to utilize these corporate and marketing resources in promotions, for assistance to other U3As, course building etc 	2019/20 2020		
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Strategic Objective 4 Strategic Organisational Strengthening

TACTICS

<i>Objectives (Action/result required)</i>	<i>Tactics (steps or actions needed to reach or support the Strategy)</i>	<i>Date to be completed</i>	<i>Responsible</i>	<i>Collaborator</i>
Strengthen present organisational structure	<ul style="list-style-type: none"> • Continue and strengthen centralized administration based on establishment of efficient main 'campuses', supplemented by satellite venues to ensure city-wide coverage and ease of access; • Duplicate current office structure of BCH and BSC to new Hampton/Sandringham venue (when obtained) • Providing assistance and understudies for key roles of OTL and Course Convenor, plus administrative/oversight/governance courses to COM members as required; • Review constitution as it applies to current environment and technology annually and make changes as required 	Ongoing 2021 2020 2019 +	COM COM/OTL OTL/COM P&G S-C	 COMM
Preparing for major	<ul style="list-style-type: none"> • Develop a five year budgetary plan to support initiatives 	2019/20	P&G S-C	COMM,

expenditures on venues and equipment	<p>and build in potential grant schemes, partner contributions, growth of membership revenue, commitments for securing class venues etc;</p> <ul style="list-style-type: none"> • Make provisions for legitimate funds raising accounts for major projects • Devise a project expenditure system for major projects 	2019/20 “	Treasurer/ G&F S-Cs “	Executive
Additional solicitation of financial assistance through grants, corporate sponsorship, regular financing tranches, bequests	<ul style="list-style-type: none"> • Create grant solicitation program with timetable for all the schemes and sources available for BU3A; • Canvass Network and larger U3As for advice on fund raising; • Build a sponsorship package offering value to commercial partners without jeopardising BU3A integrity and charter; • Clarifying status for tax and charity purposes; 	2019/20 ongoing annually “ “ “	G&F S-C “ “ “	COMM Executive COMM COMM
Increasing fund raising activities	<ul style="list-style-type: none"> • Make raffles and competitions part of the socialising culture of the organisation to increase awareness of the need for sustained funds , • including space for special-purpose donations on enrolment forms, on web-site • Start a Building Fund for our proposed Hampton centre 	2019	G&F SC	
Enhancing BU3A's brand recognition and awareness within Bayside City and environs	<ul style="list-style-type: none"> • Marketing activities as per marketing plan/strategic objective • Regular radio programs • Regular sharing of information and programs to all other community organisations in Bayside • Introduce a BU3A Poll of members opinions on various local and social issues; better data mining of BU3A 	2019	M&M SC R&E SC	

	<p>resources to contribute to community knowledge;</p> <ul style="list-style-type: none"> • Proactive canvassing for renewed coordinated action and consultation under BCC auspices of all seniors groups and clubs in Bayside; quarterly meetings envisaged • Initiation of joint activities and larger projects on a closely collaborative basis; • Building institutional support for accommodation initiatives and for course development; this may mean dedicated “staff” role 			
<i>Maintaining close operational and policy relations with BCC at all levels</i>	<ul style="list-style-type: none"> • Regular half-yearly meeting at Executive level; • Inviting and hosting Councillors and Council staff at functions of BU3A • Regular invitations to prime liaison staff of Council to attend Com meetings • Ensuring all communications between BU3A and BCC are via an established conduit and are not ad hoc. 	2019	F&D SC	
<i>Actively supporting U3A Network activities primarily at Regional level</i>	<ul style="list-style-type: none"> • Additional dedicated representation at Network and regional functions/initiatives • Exchange of data and ideas • Joint course development 	2019	COM P&G SC	
<i>Undertaking major strategic Initiatives to support and engender growth</i>	<ul style="list-style-type: none"> • Introducing –with others—better elderly transportation within Bayside City servicing U3A venues and other key spots; • Upgrading of venues and facilities used by BU3A to make more suitable for U3A classes, where appropriate and cost effective in terms of type of usage; • Obtaining licenses to manage the Beaumaris Seniors 	2020/21 2019 + 2019 +	COM F&D S-C/ others “	BCC “

	<p>Centre on behalf of Council, or some other arrangement, to allow better utilisation of the facility by U3A, whilst ensuring other users are satisfactorily accommodated;</p> <ul style="list-style-type: none"> • Making provision for BU3A participation in a centralised BCC –created community hub in Hampton –with a time horizon of 5-6 years; • Negotiating in the meantime for the lease or use of another facility in the Sandringham/Hampton nexus, so as to progress membership expansion; • joint marketing with other clubs/groups/corporates; • canvassing for better parking situations around course venues 	2019 +	P&G S-C	COMM
		2019 +	“	Facilities S-C
		2020 + 2019	M&M S-C COM	

Strategic Objective 5 Securing Appropriate (fit for purpose) Class Accommodations

TACTICS

<i>Objectives (Action/result required)</i>	<i>Tactics (steps or actions needed to reach or support the Strategy)</i>	<i>Date to be completed</i>	<i>Responsible</i>	<i>Collaborators</i>
Expediting course-venue	<ul style="list-style-type: none"> • Identifying and inventorying suitable accommodations in 	2019	F&D S-C	

<i>matching</i>	<p>and nearby Bayside</p> <ul style="list-style-type: none"> Increasing use of spare or under-utilised corporate facilities Negotiating MOUs with owners of properties used by BU3A as to guarantee longevity of tenures and (potentially) limited upgrading or enhancement; Collaborating with other U3As for joint courses or events and swapping of venues Optimising current accommodation through securing new types of satellite facilities in light of new courses; e.g. boats, churches, sporting clubs, excursions (parks), libraries, galleries Upgrading/enhancing, at BU3A expense or jointly with owners, some accommodations where tenure is (or can be made) secure, to ensure better “ fit for purpose” 	<p>2020 + 2020 +</p> <p>2019 +</p> <p>2020 +</p> <p>2021 +</p>	<p>“</p> <p>“</p> <p>“</p> <p>“</p> <p>“</p>	
<i>Making good existing accommodations</i>	<ul style="list-style-type: none"> Liaise with BCC to ensure OBCH is improved to make it more suitable for multiple concurrent courses, including sound-proofing and minor alterations, renovations of toilets etc Negotiating with BCC to secure licenses (or leases) to operate council facilities where BU3A are by far the major users, and where more direct control would benefit operations; 	2019	F&D S-C	COMM
<i>Preparing financially and organisationally for direct control and surety of accommodations</i>	<ul style="list-style-type: none"> Expand operations to include securing Hampton/Sandringham premises (either by lease or arrangement through BCC) to further improve coverage of the main population distributions within the city – pending the Hampton Hub. Organizing working bees and involving service clubs to 	<p>2020-21</p> <p>2020 +</p>	<p>F&D S-C</p> <p>“</p> <p>“</p>	<p>Legal/Governance S-C</p>

	<p>effect minor renovations of venues</p> <ul style="list-style-type: none"> • Securing and appointing volunteers for additional centre in Hampton/Sandringham plus integrating same into overall organisation 	2020 +		

Plan compiled by Strategic Planning Sub-Comm-- Stephen Le Page, Vice-President BU3A 2019