OSHER LIFELONG LEARNING INSTITUTE: CALIFORNIA STATE UNIVERSITY LONG BEACH

Strategic Plan – Membership – 2022-2024

Submitted to the Bernard Osher Foundation for Approval on February 25, 2022

**Overall Goal:** Grow membership to meet and exceed the Bernard Osher Foundation required sustainability level of 1000 unduplicated, dues-paying individuals annually, and return to our 2000 member pre-pandemic level, including a growing membership in the 50-70 age range, and with a growing membership reflecting diverse ethnic/racial representation.

**Objective 1:** Achieve a stable membership of at least 1000 within one year (Spring 2023) and return to pre-covid numbers by Summer 2024.

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| Strategies | Responsible Entities | Timeline | Indicators of Success |
| 1. Work with the CSULB School of Business Marketing 437 class to develop and sustain a social media presence using digital marketing to attract younger members. | Marketing & PR Working Group (WG), ProClass online registration software staff, and volunteers | Spring 2022, and ongoing | Implementation of the marketing plan.  New/renewed memberships tracked on our online registration software (ProClass) attributable to Facebook. |
| 1. Continue print and digital ads and press releases through local media | Marketing & PR WG, ProClass staff, and volunteers | Quarterly in advance of each session | Documented media ads and press releases, quarterly.  New/renewed memberships tracked on our online registration software (ProClass) attributable to local media ads. |
| 1. Continue to send quarterly PDF or hard copy of The SUN newsletter/schedule of classes to our identified list of senior groups, city government, neighborhood associations, service organizations and senior centers, including offers to speak at Zoom or in-person events. | Marketing & PR WG; Member Services WG | Quarterly in advance of each session | Documented distribution of The SUN.  Number of requests for presentations.  New/renewed memberships tracked on our online registration software attributable to community organizations and/or presentations. |
| 1. Contact non-renewing members from 2018-present. | Member Services WG and volunteers; staff | Spring/Summer 2022 in anticipation of Fall membership drive. | 10% renewal rate by 2024 |
| 1. Invigorate the Bring a Friend referral campaign, including free special events and open houses in-person and online. | Marketing & PR WG, Education WG | Quarterly beginning before the Fall 2022 session. | Tracking of new memberships resulting from the campaign  Documentation of free events and open houses. |
| 1. Establish a “*budget for events that bring people together, generate interest in OLLI and may create a “buzz” that will be passed on to non-OLLI friends and relatives, since we know that is how we get most of our members*.” | Governing Council, Member Services WG, Marketing & PR WG, Education WG, Executive Director, staff | Fiscal year 2022 and ongoing | Approval of budget 2022-23  Documentation of use of funds |
| 1. Update our online Member Handbook to reflect current information and continue new member orientation events to retain members. | Member Services WG, staff | Semi-annually | Documentation of updated handbook available on our website  Documentation of semi-annual new member orientations.  Feedback from members attending the events |
| 1. Investigate adding video clips of classes and testimonials to the website. | Staff, Education WG, Technology WG | TBD by website capability | Video clips added to the website  Feedback from viewers |
| 1. Outreach to the University Alumni Association to increase membership diversity and age range. | Executive Director,  Member Services WG | Ongoing | CSULB Alumni membership increases validated in the biennial member surveys |
| 1. Introduce Hybrid classes | Executive Director, staff, Education WG,  Technology WG | Summer 2022 and ongoing | Documented attendance at hybrid classes and feedback from participating members. |

**Objective 2:** Develop a marketing strategy to enhance the diversity of our membership to better reflect our local community

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| Strategies | Responsible Entities | Timeline | Indicators of Success |
| 1. Create a targeted marketing plan to include resources that reflect our diverse demographic based in part on meetings and focus groups with targeted group members. | Marketing & PR WG, Governing Council, staff, Executive Director | Summer plan development for initiation Fall 2022 | Completion of the plan and implementation with a minimum of two diverse communities by 2024. |
| 1. Create dialogue about diversity issues though delivery of at least one OLLI class that includes or presents a diversity-related topic. | Education WG | 2023 and ongoing | Class delivered and feedback collected and reviewed |
| 1. Establish an off-site venue within our diverse local communities | Executive Director, Governing Council, Staff | 2023 and ongoing | A minimum of one venue established within our diverse local communities |