

# Strategic Plan 2021 - 2024



## Purpose and Mission

U3A Brisbane is a volunteer-based organization providing learning programmes and activities intended to improve physical and mental well-being. We offer stimulation and development to those persons no longer working full-time, in the third age of life.

## Values

We are a not-for-profit community association dedicated to providing a competent and ethical service to members. We value behaviors which are fair, honest, and inclusive. Members can expect an environment which is safe, welcoming, encouraging, and supportive.





The U3A Brisbane Strategic Planning group met in May 2021 to start developing a strategic plan for the next 3 years.

At this meeting a Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis was carried out and the group ranked the key SWOTs:

#### Strengths

- Learning & collegiality linked to positivity/professionalism of tutors/volunteers/office staff
- Tech capability enabling us to manage more with less

#### Weaknesses

- Succession planning
- Current problem with class limitations due to COVID-related rules

#### Opportunities

- Engagement with/marketing to larger community is needed
- Expand Zoom/online class capability (eg with the Network), external presenters' potential

#### Threats

- COVID precautions/shutdowns (eg leading to refunds of class fees)
- U3A trademark (UK 3rd Age Trust TM) unresolved

Subsequent meetings and discussions prioritised the following U3A Brisbane critical strategic objectives:

- 1. Maintain and grow membership numbers.**
- 2. Recruit more tutors and offer more classes.**
- 3. Implement a succession plan for key roles.**

During the discussions on how to implement the strategic plan, it was agreed that U3A Brisbane's accommodation and financial resources should be carefully analysed and forecast, so the needs analysis outlined following the Goals pages forms part of the overall strategic plan.

## Goal 1 – Maintain and Grow Membership

Goal	To expand Membership of U3A Brisbane	Who	When
Actions	Create a Marketing Sub-Committee to build and execute a promotion plan to drive consistent messaging to our demographic, both inside and outside U3A Brisbane.		
Expected Results	Marketing Sub-Committee established.	GD + MC	Now Ongoing
	Links with community organisations like Lions, Rotary, Probus and Cota, Men's Shed, Retirement Villages, etc established.	Sub-Com	Now Ongoing
	Lobbying of local and state government taking place.	Sub-Com+ NB/G PW	Now Ongoing
	Members proactively engaging in word-of-mouth publicity.	All	Ongoing
	Presentations also made available to non-members – Winter School style; Zoom versions too are taking place.	WS Com, MW DT GT +	2022 Ongoing
	Print Media organised - Regular features in Seniors' publications, Local Area newspapers, Flyers in public venues.	Sub-Com	post COVID
	Social Media: Facebook presence refreshed and classes promoted. Other online forums investigated.	Sub-Com/GD	Ongoing
	Coffee catchups after weekly classes have been encouraged and members bring a friend to some classes.	Sub-Com	post COVID
	Open Days with Morning Tea - Meet our Tutors, see what we do taking place.	Sub-Com/Social Com	post COVID
	U3A Brisbane Zoom class membership promoted throughout the State and nationally. Zoom Special Events promoted to other U3As.	Sub-Com DT, GT, Netwk	Ongoing
Maintained and extended association with U3A Qld Network - followed up contacts under MOU with LGAQ.	Sub-Com/GD	Ongoing	

## Goal 2 – Recruit Tutors and Classes

Goal	Recruit more Tutors and Classes in specified areas based on Needs Analysis	Who	When
Actions	Create a Tutor Sub-Committee comprised of people who could mentor and "sit beside" new/aspiring tutors and give support and guidance until they get on their feet.		
Expected Results	Tutor Sub-Committee established.	Sub-Com:- YMcG, GH, MC,MD,DT,GT	Term 4
	Complete a Needs Analysis based on current data to identify Class Categories which have the highest number of COVID closed classes and areas where more Tutors or Classes are required.	Sub-Com	2021 Ongoing
	Tutor introduction and "get started" classes to encourage members to try tutoring introduced.	Sub-Com	2022
	Links with teachers' colleges, teachers' unions, retired teacher associations re-established.	Sub-Com	2021 Ongoing
	Member database reviewed for who may be invited to tutor.	Sub-Com	2021 Ongoing
	Tutors contacted re colleagues and friends who may join us.	Sub-Com	2021 Ongoing
	Social events for tutors reinstated.	Social Com	Post COVID
	Class members encouraged to take over a class when a tutor "retires".	Sub-Com	2021 Ongoing
	All tutors encouraged to be competent in the use of Zoom and able to teach online as well as Face-to-Face.	Sub-Com	2021 Ongoing
	The Membership approached and existing tutors asked to nominate people they know with the necessary expertise to tutor classes. (For Zoom tutors, they don't need to be resident in Brisbane.)	Sub-Com	2021 Ongoing
	Language classes: Tutors encouraged to mentor or nominate competent members who would be capable of tutoring their own language class.	Sub-Com	2021 Ongoing
	Outdoor classes are encouraged.	Sub-Com	2021 Ongoing
Opportunities in Districts are followed up.	Sub-Com/MC	2021 Ongoing	

## Goal 3 - Succession Planning

Goal	Succession Planning of key positions	Who	When
Actions	Revise or write Role Descriptions for every key role.		
	Prioritise successions plans for operational roles:		
Expected Results	Role Descriptions have been revised or written for every Role after discussion with incumbents.	CW	Jan 2022
	Detailed procedures, if required, have been documented. Location of secure files of current passwords relating to each role advised.	All to contribute	
	Succession Plans are in place for President, Treasurer, Secretary, ICT Manager, Office Manager, Tutor Liaison Officer, District Coordinator, Grievance Officer, Computer Coordinator, Marketing Coordinator, Health Safety and Welfare Officer, Maintenance Coordinator.	CW All to contribute	Jan 2022
	Every key position has a person who can stand-in. Stand-ins act in the role from time to time.	DT	Ongoing

## Accommodation and Financial Planning

Goal	Accommodation Needs Analysis and Financial Plan	Who	When
Actions	3 Year Accommodation Needs Analysis.		
	3 Year Financial Plan		
Expected Results	Accommodation Needs Analysis to assess the most efficient use of current spaces completed. Data available to help in decision making on the retention of the Adelaide St Venue and the future of Creek St.	NB/GH PJ	2022
	The Treasurer has been requested to provide a 3-year Financial Plan giving best-case and worst-case scenarios. This depends on the Room capacity limits set by the government in Term 1. This plan will form the basis for many of the decisions to be made, particularly in 2022.	LB	Ongoing



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