



STRATEGIC BUSINESS PLAN

U3A MELBOURNE CITY INC
(A0045765E)

2014 to 2017

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U3A MELBOURNE CITY

1. Vision

U3A Melbourne City aspires always to be a thriving well-resourced community, whose members embrace lifelong learning and positive ageing by sharing knowledge and life skills within a culture of friendship and generosity.

2. Mission

The mission of U3A Melbourne City is to:

Encourage and enable older people, no longer in full-time paid employment, to share their knowledge and capabilities to:

- create a lively learning and social community offering a wide range of subjects and activities reflecting the interests of members.
- demonstrate their continuing value to society.

3. Our organisation

U3A Melbourne City is the oldest University of the Third Age in Australia, established as a result of a public meeting in July 1984. We are an incorporated association, currently with over 1100 members. In keeping with the U3A ethos, we are a self-funded, voluntary organisation formed to provide learning opportunities to members aged 50 plus who are retired or not working full-time. U3A Melbourne City caters for retired and semi retired people throughout Victoria. Most of our membership comes from the Melbourne metropolitan area with 25% from the City of Melbourne area.

As an organisation run by volunteers there is a strong emphasis on self help. To date a lot of the administrative support has been performed by a small dedicated group.

Our volunteer tutors and course leaders offer an extensive educational and recreational course program. A full social programme compliments the academic one. Some classes are run on an annual basis and others are run for periods between 4 and 8 weeks. All our classes are run in the Melbourne CBD and a high percentage are at Ross House in Flinders Lane. The U3A Melbourne City office is based in Ross House. All our classes run between Monday and Friday and most run between 10am and 4pm.

Participants in our classes and social programmes gain a number of benefits – stimulation; new knowledge, new or renewed friendships; a chance to participate and the ability to share and learn from others

A main advantage is our easily reached, central location plus the diversity of our courses/programmes and generally high calibre of volunteer tutors and group leaders. We encourage a lot of seniors to travel to the CBD on a regular basis and join others in the area in activities outside the U3A such as the cinema, shopping, visiting cultural venues and diverse street life.

The City of Melbourne has acknowledged our contribution to the life and diversity of the inner city and our role in substantiating Melbourne's claims to be age-friendly, knowledge based and supportive of life-long learning

4. Organisational Competencies

- **Commitment to and knowledge of the Organisation** – an understanding of the mission and functions of U3A Melbourne City
- **Communication** – understanding who needs to know what and ensuring the information is delivered appropriately
- **Course delivery** –the ability and knowledge to provide positive adult learning experiences
- **Decision making** –defining the issue, fact-gathering, considering possible solutions and selecting the best option
- **Leadership** –involving the skills to organise, motivate and/or develop others
- **Organisational and administrative skills** –managing time appropriately, setting priorities and tasks as well as performing tasks accurately and efficiently
- **Teamwork** –involving persuading, helping, listening, and getting along with others
- **Technical expertise** –the management of computer systems and the ability to understand and maintain hardware and software

5. Organisational Values

- **Adaptability** –We try to provide for members in a variety of ways
- **Commitment** We operate in accordance with the highest standards in all relationships
- **Friendly interaction**–We aim for all members to enjoy their membership
- **Fun learning environment** – We encourage life-long learning and develop knowledge and skills

6. Highest Priority Goals

- **Accommodation**–Expand the office facilities for U3A Melbourne City
- **Courses**–Foster more active engagement by tutors
- **Promotion**–Create awareness of U3A Melbourne City amongst potential stakeholders through regular PR programmes
- **Funding**– Develop and implement targeted programme for additional funding.
- **Members**–Increase the proportion of members living within the City of Melbourne
- **Technology/IT**–Fully review future technology and software requirements

7. Achievements

After almost 30 years since its inception U3A Melbourne City is in a period of growth with a 30% increase in members in the last five years.

Major achievements are

- Membership maintenance and growth
- Continual increase in number and breadth of courses and social events offered to members
- Strong core of dedicated volunteers

- Organisation of monthly forums on diverse topics
- High quality newsletter for members
- Reduction in social isolation among members
- Diversification of funding base
- Adoption of new systems and technology

Our key stakeholders are

- Our members
- Ross House Association
- Melbourne City Council
- U3A Network
- State and federal government
- Other U3A's
- Other senior networks e.g. National Seniors, COTA, Life Activities

8. Environment analysis

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> ➤ Long-established with successful reputation ➤ Affordable membership ➤ Fiscally responsible ➤ Central location ➤ Breadth and quality of course programs ➤ Appealing social programs ➤ High quality communication (website, newsletter, e-bulletins etc) ➤ Efficient & effective administrative systems and practices ➤ Dedicated skilled core volunteers ➤ Well developed database ➤ Increasing technological competence ➤ Recognised by City of Melbourne ➤ Good relationships with stakeholders/suppliers ➤ Membership increasing annually ➤ Regular increase in members offering to be tutors 	<ul style="list-style-type: none"> ➤ Too few committed and skilled volunteers ➤ Burn-out in long-serving volunteers ➤ No succession planning ➤ Accommodation pressures – classrooms ➤ Scarcity/high cost of alternative classroom venues ➤ Lack of community spirit among members ➤ Lack of collegiality and participation among tutors ➤ Technological challenges (skills) ➤ Technology challenges (facilities, e.g database)

Macro-environment

<p style="text-align: center;">POLITICAL/LEGAL</p> <ul style="list-style-type: none"> ➤ Change of government (local, state, federal) ➤ Legislative requirements ➤ Changes to government policy ➤ Government stability 	<p style="text-align: center;">ECONOMIC</p> <ul style="list-style-type: none"> ➤ Government budget constraints and conflicting priorities ➤ Inflationary cost pressures ➤ Income challenges for retirees ➤ Fluctuations in the financial market ➤ Increase in late or deferred retirement ➤ Increase in part time work amongst seniors ➤ Time pressures e.g. family child minding commitments ➤ Increasing technology costs ➤ Limited low cost classroom accommodation facilities in CBD
<p style="text-align: center;">SOCIO-CULTURAL</p> <ul style="list-style-type: none"> ➤ Ageing population ➤ Growth of City of Melbourne population ➤ Increasing numbers of semi retired people ➤ Increasing diversity in community ➤ Changing aspirations of society ➤ Immediacy of information 	<p style="text-align: center;">TECHNOLOGY</p> <ul style="list-style-type: none"> ➤ Continually new and emerging technologies ➤ Increasing technology dependence ➤ Mobile technology ➤ Diverse knowledge and usage of technology amongst members

Like many organisations run solely by volunteers we are continually faced with issues around the recruitment and retention of volunteers. All our classes are run by volunteer tutors and we are regularly looking for new people who will provide us with a greater range of courses.

Another major challenge is that of finding and maintaining suitable accommodation for our classes at a price that allows us to maintain a low membership fee. We are constantly searching for new venues for classes and these need good access to public transport.

Feedback from our members, and some potential members, indicates there is an increasing demand for our services. This includes an interest in more short term courses to meet the younger members desire to have limited long term commitments in their early years of retirement.

OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> ➤ Untapped potential membership (baby boomers) and their skills ➤ Reaching other funding support and sponsorship ➤ Growing memberships ➤ Expanding tutoring base through new tutors ➤ Auspicing ➤ Technology –administration, content of courses; presentation ➤ Promotion of the organisation and its benefits ➤ New, relevant course activities ➤ Legislative changes ➤ Government support –all levels ➤ Partnerships –other U3A’s; other NFP’s; other educational organisations; COTA; NS ➤ Meaningful research ➤ More technologically minded membership –increased efficiency in services ➤ U3A Network ➤ Encouraging members social interaction ➤ Nurture volunteers 	<ul style="list-style-type: none"> ➤ Membership growing too big for support capabilities ➤ Accommodation issues –availability; funding ➤ Demographic change ➤ Economic changes –more people working part time for longer and forecast of many more retiring with minimal income ➤ Programmes becoming too diversified ➤ Inability to attract volunteers ➤ Cessation of funding to support services ➤ Grand parenting a time thief of potential members ➤ Funding –membership is only secure income ➤ U3A Network ➤ New retirees uncertain about how they want to spend their time ➤ Inflation may lead to a need to increase fees ➤ Danger of elitism ➤ Travel commitment of members may limit their course enrolments ➤ Similar organisations compete for members e.g. Life Activities and other U3A’s ➤ Falling membership numbers ➤ Changing technology and keeping up with it ➤ Loss of continuity of knowledge among volunteers ➤ Loss of accommodation esp Ross House ➤ Keeping up quality of course offerings ➤ Possible loss of key volunteer personnel ➤ Competition e.g. CAE ➤ Location limits expansion

There are over 100 U3A’s in Victoria all offering courses in different subject areas depending on the knowledge of their volunteers. Melbourne City aims to provide a range of courses that appeal to a broad spectrum of the population, from botanical illustration, multiple level language classes, English literature to games such as Mah-jong and Bridge.

Our main competitors, offering courses to the same age group, are the Centre for Adult Education, TAFE’s and neighbourhood houses. Other organisations that have some activities, such as social events and speakers that attract retirees include Senior Citizens Centres, Probus, Life Activities, National Seniors, COTA and many sporting and cultural and church organisations.

U3A Melbourne City serves the needs of those retirees seeking one of the following –a specific course; ease of access via public transport and a central city location; a well run organisation in which they can participate at many different levels and the ability to gain contacts at a wide variety of classes, social events and forums.

In May 2012 the Plan Melbourne forecast was for over the next 30-40 years the population of the Melbourne metropolitan area is to double.

Our organisation offers:

- A low annual membership fee with no additional charge for courses
- A community with an enduring membership
- Opportunities to develop and nurture new social networks and friendships
- Encouragement to participate in running the organisation.
- Members the opportunity to have a say in what we offer and how we are run

Reasons members join U3A Melbourne City include:

- Word of mouth recommendation from friend or acquaintance
- Interest in particular course/s being offered
- Low cost of membership
- Location of classes
- Ease of dealing with the organisation
- Ability to meet new people
- Receiving information about activities via social media
- Interesting and varied social programmes

9. Promotion

We will continue to maintain and develop:

- *Website* -<http://www.u3amelbcity.org.au>—developing the functionality of our website and frequently updating it with current information
- *Facebook* – developing this as an engaging, topical means of interacting with members and the broader public
- *Youtube* - developing this as an engaging, topical means of interacting with members and the broader public
- *Newsletter* –a bi-monthly newsletter for members - updating them on forthcoming events and reporting on some recent events. It includes an introduction to a member in each issue.
- *Monthly email updates* --sent to approx. 80% of members who have given us email addresses
- *Special emails* as event reminders

We will participate in:

- Seniors Week –where we join with other U3A’s to highlight the diversity of interests that U3A’s cover.
- Providing speakers to talk to interested groups (such as the Southbank residents) about our organisation.
- Increasing awareness of our presence in the City of Melbourne by Committee of Management members establishing regular contact with the Councillors and staff.

10. Research and Development

During this 3 years we will

- Continue to survey baby boomers and their requirements
- Prepare a history of the organisation
- Continue to analyse member feedback on courses
- Investigate expanding the use of technology in classes

11. Risk Management

The major risks have been assessed as

- Safety/health emergencies for members
- Loss of access to Ross House
- Succession failures in volunteer positions
- Data loss or breach
- Loss of current class room venues
- Financial fraud or mismanagement of finances
- Non compliance with governance requirements
- Over subscription by members
- Lack of diversity

The Committee of Management has developed risk mitigants for each of these risks and risk management will be an agenda item for each meeting of the Committee of Management

12. Regulatory Compliance

The Association has a Code of Conduct ,a Grievance Procedure policy and an Harassment policy and will update its Privacy Policy.