



# STRATEGIC PLAN

2022-2026

## [Abstract](#)

The Strategic Plan aligns with the Association's core values and its principal objective to maintain a vibrant association of healthy, happy, empowered and socially integrated seniors who live life to the fullest.

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## U3A SUNSHINE COAST A Founding Member of U3A Network Queensland Strategic Plan 2022 – 2026

We acknowledge the traditional custodians of the lands on which we walk, live and work and pay our respects to the Elders, past present and emerging

### *OUR VISION*

An association of healthy, happy, empowered and socially integrated seniors.

### *OUR MISSION*

Facilitate physical, intellectual and social activities that promote wellbeing for seniors on the Sunshine Coast.

### *OUR VALUES*

**Respect** - for all people we encounter in our daily lives

**Inclusiveness** – a welcoming, friendly culture that encourages seniors to engage in programs that are affordable

**Creativity** – new ideas and innovative practices that enrich people's lives

**Accountability** – the highest level of open and good governance

### *OUR GOALS*

Communicate and market U3A internally and externally

Provide members with varied activities and learning opportunities

Develop, nurture and sustain tutors and volunteers

Establish new external partnerships and nurture existing ones

Ensure a viable and sustainable organisation

### GOAL 1: Communicate and market U3A internally and externally

Awareness in the community of what U3A is and offers

LEAD /RESPONSIBILITY: Communications Officer, Communications Team, Systems Administrator and Web Administrator

Strategy	Actions
Promote benefits of U3A membership internally.	<p>Educate and inform members about U3A membership, through:</p> <ul style="list-style-type: none"><li>• Educate members about the benefits of U3A through articles in eVoice, on Facebook, at Open Days, New Members Meetings and at Tutor and Volunteer meetings.</li><li>• Inform members about sound managements practices employed within U3A that enable the organisation to be sustainable and viable into the future.</li><li>• Continually review the ways we communicate with members to ensure communication is innovative, targeted, current, fresh, inclusive and valued.</li><li>• Obtain feedback from the members regarding communication reach and readership.</li></ul>
Promote benefits of U3A membership externally.	<p>Actively market U3A as a valuable resource within the community, one that contributes positively to the wellbeing of seniors, through:</p> <ul style="list-style-type: none"><li>• News stories in local and state government digital media.</li><li>• Presentations at major community events, such as Seniors Week, I Age Well Expo, Science Week and Local Government events.</li><li>• Conduct an annual information and social event focusing on U3A and its place in the community life of seniors.</li><li>• Provide communication products such as eVoice to local and state government agencies and to major seniors and charitable organisations.</li></ul>
Build the U3A brand awareness and understanding in our community.	<p>Promote the benefits of U3A and conduct activities that lead to increased membership through:</p> <ul style="list-style-type: none"><li>• News stories in local media.</li><li>• Presentations at targeted community events, such as Seniors Week, I Age Well Expo, Science Week and Local Government events.</li><li>• Consider a mid-year information and social event focusing on group activities where members may invite and introduce friends to U3A..</li></ul>
Standardise U3A Sunshine Coast branding across all platforms and media	<p>Ensure U3A Sunshine Coast branding is standardised and consistent.</p> <ul style="list-style-type: none"><li>• Produce and implement Brand Guidelines across the organisation.</li><li>• Research and identify a tag line that can lessen the academic connotation of 'university' in the name U3A, which leads to confusion in the public mindset.</li></ul>

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Strategy	Actions
Produce an annual communication plan in accordance with the Strategic Plan.	<p>Ensure the Communication Plan covers all aspects of the Strategic Plan, by:</p> <ul style="list-style-type: none"><li>• Continual review of changes to the Strategic Plan and amend Communication Plan accordingly.</li><li>• Review and where necessary revise the Communication Plan every six months.</li></ul>

<b>EXPECTED RESULTS</b>	<p>The Annual Communication Plan presented each February to Management Committee for review and endorsement prior to the Annual General Meeting.</p> <p>The Communications subcommittee will actively coordinate relevant activities in accordance with the Communications Plan.</p> <p>Articles and information will be shared increasingly to external newsletters, social media and websites.</p> <p>Promotional material will be produced for use at events and other venues, with the aim of promoting U3A Sunshine Coast.</p> <p>Relevant digital and other technologies will be utilised to support distribution and sharing of information that promotes U3A in the community.</p> <p>A cloud- based Network document storage system to be developed to allow access to committee and members as the central depository for the organisation's information</p> <p>E-Voice will be produced at least six times per year for distribution to all members and stakeholders</p> <p>An online event registration, bookings calendar platform will be developed and implemented.</p> <p>A package of videos online will be made available to members to guide them in the use of online technologies and social media.</p>
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### GOAL 2: Provide members with varied activities and learning opportunities

Identify and respond to the learning expectations of our members

*LEAD /RESPONSIBILITY: Tutor and Courses Coordinator, Lecture Coordinator, Management Committee, Member Liaison Officer, Systems Administrator*

Strategy	Actions
Provide activities and programs that cater for members' needs.	<p>Develop an effective member survey and feedback system to identify member needs</p> <p>Conduct an online survey with all stakeholders (members, tutors, class coordinators, lecturers, volunteers) to identify any needs/gaps for potential new courses and level of satisfaction with current courses</p> <p>Continue to provide a wide variety of classes that satisfy existing members and attract new members</p> <p>Continue to provide and promote classes that support positive healthy aging</p> <p>Promote, support and encourage membership of U3A Online, the virtual University of the Third Age, as a way to overcome issues, whether geographic, physical or social, which prevent attending classes in person.</p> <p>Tailor educational and lifestyle classes that provide accessibility for all members</p> <p>Establish a member liaison position to provide feedback and follow up on membership issues</p>
Explore and implement innovative delivery methods.	<p>Continue the development of an online HUB based on in-house social media pages that allows for communication between various U3A groups and within the members of related classes e.g. literature or art</p> <p>Provide training in the use of the online HUB to volunteer HUB leaders</p> <p>Develop and promote a library of online lectures via video recording to be accessed by members</p> <p>Develop online training programs that guide members through the effective use of web-based technologies and applications</p> <p>Support the use of Zoom where there are benefits to members using this method of delivery</p>
Contain level of membership expansion to maintain quality opportunities.	<p>Identify at what level member growth is not sustainable and at what stage new geographic hubs should be considered</p>

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<b>EXPECTED RESULTS</b>	<p>Membership of U3A Sunshine Coast will continue to grow to sustainable levels</p> <p>A survey of members conducted to reaffirm and improve the organisation's direction</p> <p>An easy to use effective feedback system to follow up reasons for non-renewal of membership and possible remedial action</p> <p>A process for establishing Tutor mentoring, forums and recognition opportunities be developed</p> <p>A program established to promote and widely advertise the ongoing need for Tutors</p> <p>A new system for online learning for members available by mid – 2022</p> <p>A library of on-line lectures via video able to be accessed by members</p> <p>A Member Liaison officer to report to the Management Committee on surveys of and feedback from members</p>
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## GOAL 3: Develop, nurture and sustain volunteers

A sense of community to increase participation and engagement of members

*LEAD /RESPONSIBILITY: President, Management Committee, Member Liaison Officer*

Strategy	Actions
Identify potential tutors and other volunteers and actively promote the benefits of contributing.	<p>Promote and advertise for tutors/coordinator in each of the ways identified such as current members, mainstream media, Open Day; and monitor success rate of each</p> <p>Identify needs and skillsets for volunteers</p> <p>Encourage participation in volunteering roles as a valued part of U3A membership</p> <p>Find ways to involve members in recruiting new tutors or course coordinators</p>
Provide training and support to tutors and volunteers.	<p>Provide training, development and support to tutors and other volunteers, according to their requirements</p> <p>Encourage a collegiate spirit amongst tutors and other volunteers</p> <p>Mentor and assist tutors in the establishment of new classes and activities.</p> <p>Have a formal feedback system to ascertain levels of support required from U3A following initial training and during the duration of courses</p>
Acknowledge and express appreciation for the contribution of all.	<p>Continue current recognition program.</p> <p>Promote and recognise the role of Tutors by way of forums that share ideas and give due recognition to the roles of Tutors</p> <p>Promote volunteering in key areas of demand</p> <p>Recommend members for community awards</p>
Develop a feeling of belonging amongst tutors	Half yearly support meeting and annual lunch

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<b>EXPECTED OUTCOMES</b>	<p>Regular training sessions and small social function opportunities provided for volunteers and tutors</p> <p>A well-attended New Members introduction morning, held twice a year</p> <p>Member and Tutor handbooks that provide accurate, relevant and current information</p> <p>A formal feedback system put into place by November 2022</p> <p>A strong sense of community is fostered, increasing participation and engagement of volunteers</p>
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## Goal 4: Establish new external partnerships and nurture existing ones

Improved links with a variety of stakeholders that are mutually beneficial and increase recognition of U3A as a voice for seniors in the community

*LEAD /RESPONSIBILITY: President, Management Committee, Business Development Coordinator*

Strategy	Actions
Establish local, regional and state partnerships along with other community and organisational relationships.	<p>Reconfirm our relationship with and accommodation at the University of the Sunshine Coast – USC. Identify partnership opportunities in the Age Friendly Universities program</p> <p>Continue to support USC undergraduates by the provision of annual bursaries, the Frayda Myers Cooper annual award and identify opportunities to support international students</p> <p>Develop a working relationship with the Sunshine Coast Regional Council - SCRC to raise recognition of our U3A and its value in being an advocate for seniors across the LGA</p> <p>Identify external partners/providers who are able to assist with cost effective, usable venues to meet our members' needs</p> <p>Seek opportunities for working with external organisations to initiate learning and social opportunities for members and other seniors on the Sunshine Coast</p>
Seek to identify and respond to expansion opportunities.	<p>Seek additional accommodation solutions to allow for organic growth</p> <p>Develop awareness-raising and funding proposals</p> <p>Continue to pursue managed permanent facilities in the Caloundra area to establish a HUB</p>
<b>EXPECTED OUTCOMES</b>	<p>A close working relationship in partnership with USC</p> <p>Relationships with local government and community groups established, giving an increasing awareness and understanding of U3A on the Sunshine Coast</p> <p>An annual program of Grant applications established, matching our requirements with the Grant Programs offered</p> <p>Continued actions that enable the provision of appropriate venues for classes and other lifestyle activities</p> <p>Continued the investigation for opportunities for a partnered physical presence in Caloundra</p>

### Goal 5: Ensure a viable organisation into the future

Effective management of resources and sound financial practices enabling the organization to continually renew, evolve and innovate

*LEAD /RESPONSIBILITY: President and, Management Committee*

Strategy	Actions
Ensure high standards of governance practices.	<p>Review of organisational structure to ensure it meets current and future needs</p> <p>Develop an annual budget, monitor and review the financial plan, resources and reserves at least quarterly.</p> <p>Develop a succession plan for Management Committee members.</p> <p>Identify members with the qualities required to contribute to the ongoing running of the organisation.</p> <p>Devise operational plans that provide guidance to management and subcommittees on elements of the Strategic Plan</p>
Refine processes and systems continually in order to optimise services for members	<p>Continually review policies, governance requirements, the Constitution and operating procedures</p> <p>Develop online training programs that guide members through the effective use of web-based technologies and applications</p> <p>Monitor changes to and advances in technology as they relate to our courses and the management of the organisation</p>
Monitor success and achievements towards the organisation's goals, and identify any threats to the organisation's viability	<p>Review actual performance of 5-year Strategic Plan annually against annual plan</p>

<b>EXPECTED OUTCOMES</b>	<p>The formation of a subcommittee to develop broad annual operational plans to progress the actions and achieve the outcomes of the strategic plan</p> <p>Financial reserves are maintained at sustainable levels</p> <p>Annual budgets that reflect and enable the strategic direction to continue</p> <p>Strategy developed that provides appropriate guidance for steering and subcommittees in support of management committee requirements</p> <p>A comprehensive succession plan in place.</p> <p>Annual governance review carried out in accordance with the QLD U3A Network Governance Checklist</p>
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