**FUTURES PLANNING – REPORT TO MANAGEMENT TEAM**

**BACKGROUND**

1. **Consultation**

A total of four consultation sessions in relation to Futures Planning have been held by Sue and John Mikus, with 45 members participating:

* Tathra Taboo Topics group, 1 May 2018, 14 participants
* Tura Beach Taboo Topics group, 2 May 2018, 19 participants
* Program Team, 2 August 2018, 8 participants
* Brains Trust, 15 August 2018, 4 participants

Input has also been received from a number of other members through direct contact with Sue and John.

1. **Format of consultation sessions**

Following an outline of the purpose of the sessions and the ground rules for discussion, there was a group discussion about general issues (positive and negative) with the U3A currently. Syndicate groups then looked at:

1. the values that they considered important for U3A; and
2. a SWOT analysis of U3A in terms of its strengths, weaknesses, opportunities and threats.

The key issues raised within the syndicate groups were then shared with the whole group.

**OUTCOMES**

1. **General Issues**

The discussion around general issues was mostly a warm-up for the later work in each group. The full list of positives and negatives is at Attachment 1.

1. **Values**

The values raised by the four groups could generally (and more usefully) be consolidated under the following five headings:

1. Respect and inclusion
2. A sense of community
3. Learning
4. Innovation
5. Effective communication

These values are further outlined at Attachment 2.

1. **Strengths, Weaknesses, Opportunities and Threats**

The strengths, weaknesses, opportunities and threats were, wherever possible, divided into 11 sub-groups.

The consolidated list of Strengths, Weaknesses, Opportunities and Threats is at Attachment 3.

1. **Action Plan**

Following consideration by the Futures Team, an Action Plan was developed, and this is at Attachment 4. This Action Plan sets out a number of actions, grouped under Futures themes, with the capacity to allocate responsibility and timing for each of these. The Futures Team has not allocated responsibility or timings to all actions, as it was thought that this should be part of the role of the Management Team in its response to the Futures project.

**RECOMMENDATIONS**

The Futures Team recommends that the Management Team consider the following proposals:

1. **Core Values -** endorse the Values, communicate the Values to members, and incorporate the Values into all aspects of U3A activities.

The Futures Team believes that the message to members should be that, based on member views and Management Team consideration, these are the core values for U3A. Early advice to members about the core values will assist in building an understanding of what U3A stands for, how we do business and how we behave towards each other.

1. **U3A Objectives -** develop a set of **Objectives** for the U3A Sapphire Coast and use these Objectives as a strategic framework to guide future decision making at all levels of U3A.

The Futures Team believes that the Aims articulated in Attachment 4 should form the basis of the set of Objectives.

1. **Curriculum -** establish a Curriculum Team to consider the implementation of a more strategic approach to development of the U3A curriculum (Suzanne Simon has tentatively volunteered to lead such a group).

Many of the programs currently being offered by U3A are driven by people who volunteer to run courses. This is entirely in keeping with the raison d'être for a U3A. However, feedback from members indicated that a curriculum should be developed for our U3A that looked holistically at the courses to be offered. In particular, a curriculum should be developed that is aligned with and reflects the philosophy of U3A. The curriculum should also be designed to help achieve the objectives of U3A.

1. **Communication Strategy** - establish a Communication Team to assist Carole in development of a Communication Strategy

It came as no surprise to the Futures Team that communication was one of the biggest issues for members. It also wasn’t surprising that members had a diversity of (often conflicting) views about how communication could be improved. The Futures Team believes that development of a communication strategy will help refine and focus messages by linking them to U3A objectives, will facilitate the adoption of the most appropriate channel(s) for each message, will help maintain consistency across all U3A communications and will help manage audience expectations. A template for a communication strategy is at Attachment 5.

1. **U3A Home** - maintain the current efforts to find a more ‘permanent’ U3A venue

Member feedback reflected a great deal of support for the Management Team’s efforts to nail down a more permanent venue, and also an understanding of how difficult this task was. There was a consistent view expressed that U3A should leverage off its numbers to convince the Council to be more supportive/provide greater assistance.

1. **Volunteers** - seek a volunteer to investigate best practice in how to support, manage and reward volunteers.

Volunteers in this context includes everyone who performs a role, including but not restricted to Management Team members, the Program Team, course leaders and general volunteers. Members had a good understanding that volunteers are key to a successful U3A. The Futures Team believes that it would be very beneficial for an investigation to be undertaken to look at best practice in management of volunteers, including recruitment, retention, support and rewards. Such an investigation would look at academic research, other U3As, other not- for-profit local organisations and Volunteering Australia, NSW, etc.

1. **Social Support** - seek a volunteer to be the focus for Social activities in U3A

Many members stated that the social side of U3A activities formed a very important part of their U3A experience. However, members also expressed a view that the social side of U3A was currently somewhat of an ‘add-on’ rather than an objective in its own right. Members felt that there was an excellent opportunity for more to be done to promote and support social activities both within U3A and through partnering with other local organisations. Social support also needs to be specifically identified in the U3A Objectives.

**CONCLUSION**

The Futures Team looks forward to the opportunity to discuss this paper with the Management Team.

**Futures Team**

**2 November 2018**

**Attachment 1 - General Issues**

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| **Positive** | **Negative** |
| * We value our course leaders * We are in good shape financially * Our people * Moving into Bega * Vast range of courses * Dedicated team members * Good for self esteem * Working with people * Support within teams * Courses keep going * Social connection * Friendship * Opportunities – new things * Communication – new website * Improving health, mental stimulation * Non-commercial * Variety of courses * Non-sectarian/non-partisan * Tura Beach Centre | * Inability to pay presenters * Sustainability – people, course leaders, committee * History (both +ve and -ve) * Our premises/venues * Limited accessibility outside Tura – different demographics * Conflict within committees – different agendas * Voluntary – no pay (also positive) * What do we get for our money eg no newsletter * Issues for people without IT * Communication difficult * Need a dedicated membership person * Responsibility for U3A Centre * Issues not raised appropriately – whingeing * Need better channels for feedback * Indigenous/disabilities/aged care * Lack of inclusiveness * Transport * Communication with members without computers * Council interaction * Need more talks from experts eg health * Advocacy role * Post-secondary education – lack of * Access to technology * Retirees not joining clubs – awareness/publicity * My U3A * Centre identity * Reliance on volunteers (also positive) |

**Attachment 2 - Our core values**

1. **Respect and inclusion**

We act with respect for each other’s differences, we will provide opportunities for our members to be involved in decisions which affect them, and we will model ethical behaviour.

1. **A sense of community**

We provide a supportive environment for our members to connect to each other and to the broader community.

1. **Learning**

We provide opportunities for ongoing learning for all our members, and for our members to share their knowledge with others.

1. **Innovation**

We continually strive to adapt our technology and practices to ensure the best outcomes for our members.

1. **Effective communication**

We ensure that we listen to our members and communicate with them in ways that meet their needs.

**Attachment 3 - Consolidated Strengths, Weaknesses, Opportunities and Threats**

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| **Strengths** | **Weaknesses** |
| **Member base**   * Diversity of 500+members – different lifestyles/backgrounds/skills and knowledge * People’s willingness to be fully involved in both teaching and learning * U3A promotes members’ interests and values * Membership relatively homogenous   **Committee and Organisation**   * Acts on behalf of members’ interests * Part of a national and international organisation * Good, committed management and program teams and course leaders * Emerging leadership strengths * Financially sound * Team members willing to contribute * Independent, open and transparent   **Volunteers**   * Good volunteer culture   **Venues**   * Important to have home base   **Courses**   * Good curriculum with a variety of courses which provide mental stimulation and personal growth * Good number of one-off events and short courses (appeal to course leaders who are restricted with their time) * Courses are affordable * Mostly in day time * Volunteer course leaders very talented   **Social interaction**   * Friendship & breaking down social isolation within the community * Respectfulness of other opinions * Strong social ethos * Stories to tell * Diverse personalities * Trust * Responsive to community/learning | **Member base**   * Lacking inclusivity of diverse groups - white/middle class/female/located in Tura/Merimbula * Demographically and geographically diverse target audience * Too many members * Members/course leaders are not always available – travel, illness * Why do some members pay fees and not attend courses?   **Committee & Organisation**   * The word University puts people off * Bureaucracy * Committee too often lacks harmony * No clear objectives or effective contingency planning * Don’t interact with other U3As   **Place in Community**   * Isolated from council and education   **Volunteers**   * Voluntary nature of involvement * Disinterest of members to become involved * Need more time and skills to encourage volunteers and make better use of those who volunteer   **Venues**   * Lack of permanent/satisfactory home * Lack of suitable venues to cater for full membership * Emptying the urn after each session is an OH&S risk and wastes water   **Communication**   * Communication patchy - members without on-line access disadvantaged * Keeping on line information updated * Lack of information on committees/structure to new members * Lack of understanding of U3A within the Bega Valley * What we don’t know about the wishes of our members   **IT & technology**   * Computer system & MyU3A – enrolment processes * IT access and expertise * Antiquated technical assets available   **Courses**   * No evaluation of courses * Curriculum limited by demographic/volunteers * Little identifying membership interests – diversity of options * Who decides what courses to run eg controversial issues like History of Neo-Nazism, Euthanasia etc * No courses at night/on weekends   **Course Leaders**   * Insufficient course leaders * Variable quality of presenters * Lack of encouragement/support for course leaders esp new ones * Reliance on own members for courses – need to look further * Perception of inherent bias from presenters   **Transport**   * No overall approach to facilitating transport to courses for members * Lack of public transport (x2)   **Social interaction**   * Lack of organised/formal social interaction |
| **Opportunities** | **Threats** |
| **Member base**   * More male members * Diversity to tap into eg Eden aboriginal community, Ron Finneran * Increase membership * Better utilise wisdom of membership * Eden and Bega (also a threat) – how do we develop?   **Committee & Organisation**   * New, committed management open to change * Leverage off our numbers *t*o access resources eg grants, sponsorship | **Member base**   * Becoming too popular, too many members? * Competing activities – other clubs * Different demographics (socio/eco) in local towns/Bega Valley * Different interests in the populations?   **Committee & Organisation**   * People do not want to be involved in anything much, apathy * Committee infighting, factions * Lose direction/focus by small interest groups * Management becoming dictatorial * Political agendas (external) – power and control * Burnout |
| **Place in Community**   * To provide a community resource eg A hub to link members with support bodies such as COTA, Community Transport, etc * Improving relationship with council * Links with other voluntary organisations/education facilities * Over-50 demographics – experience to share leadership in community * Growing grey power cohort * Involvement/association with TEDX/Writers’ Week etc externally provided ‘courses’ eg Bega Civic Centre   **Venues**   * Partner with other educational institutions eg use of Old Bega Hospital   **Communication**   * Use of a notice board   **Courses**   * Curriculum developed to help meet U3A objectives * Courses modified after evaluation * Broader range of subjects * Live-streaming events through existing community technology (Regional Art Gallery) * External expert presenters (one offs) * Alignment with ‘universities’ to source more formal input for courses * Look at 30% who are not going to courses – what are they looking for?   **Course Leaders**   * Make more use of external, unpaid and paid expert presenters * More talks from ‘expert’ members   **Transport**   * Find more ‘public’ transport for other groups to go to Merimbula venues   **Social interaction**   * Include social stream into curriculum to better support social interaction | **Place in Community**   * External funding * Council * Exposure to unwanted advertising   **Volunteers**   * Lost to other community organisations   **Venues**   * Lack of cohesive venue to collaborate * Lack of secure permanent venue   **Communication**   * Lack of awareness of what we do   **IT & technology**   * MyU3A falls over   **Courses**   * Courses not meeting needs * Day time vs night time and weekend * Limited funds of some members to be able to participate in some activities * Struggle to gain support when conducting outdoor courses * Difficulty catering for disabled/persons with limited mobility   **Transport**   * Courses may be at places hard to get to * No public transport (can’t drive, not within walking distance) * Insurance needs eg if started a car pool |

**Attachment 4 - Action Plan**

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| **Futures theme** | **Aims** | **Actions** | **Who** | **When** |
| Committee and organisation | To continue to provide strong and transparent leadership and decision making in consultation with members. | Develop and promote a set of objectives for our U3A which are consistent with our Constitution and which reflect the needs of our members. | Management Team |  |
| Undertake regular risk assessments/contingency planning. | Management Team | Ongoing |
| Learning | To provide a quality program of courses and events which meets the expectations of members and which reflects our objectives. | Establish a Curriculum Team to consider the implementation of a more strategic approach to a curriculum. | Management Team/Program Team |  |
| Develop a set of policies, resources and tools to assist course leaders. | Program Team |  |
| Provide ongoing support to course leaders and look at how to improve support for new course leaders. | Program Team |  |
| Provide regular ‘train the trainer’ sessions for possible new course leaders. | Program Team |  |
| Investigate the use of a range of evaluation techniques to support course leaders and to improve learning outcomes. | Program Team |  |
| Resources | To manage our financial, human, technological and physical resources in accordance with our Constitution, and to ensure the best outcomes for our members. | Continue to explore our accommodation needs, alternative venues and to look at options for a permanent venue. | Management Team |  |
| Ongoing maintenance and improvement of our web site. | Tech Team |  |
| Explore alternatives to myU3A, and develop work-arounds for existing issues eg inability to enrol for next year’s courses until fee is paid. | Tech Team/Program Team |  |
| Develop a grants policy which is consistent with our objectives |  |  |
| Develop a specific volunteers strategy using academic literature, experience of other U3As and community groups and Volunteering Australia resources. |  |  |
| Develop resources to assist members and/or course leaders to facilitate car pooling/sharing/lifts. |  |  |
| Membership base | To develop a membership base which reflects the diversity and geographic spread of our target population | Conduct a survey of members to develop a better understanding of their interests, backgrounds and expectations. |  |  |
| Consider how to improve collection and analysis of demographic information about our members. |  |  |
| Continue to look at ways to increase our membership base outside the Tura Beach/Merimbula areas. |  |  |
| Partner with local indigenous groups to encourage participants and presenters. |  |  |
| Be mindful of diversity issues when considering courses, publicity, advertising, resources (eg policy). |  |  |
| Communication | To communicate effectively with our members and with the broader community | Develop a communication strategy. |  |  |
| Address timeliness of access to information/enrolment issues for non-IT users. |  |  |
| Promote the work being done by Tech Team on web site, Facebook page. |  |  |
| Develop specific material for notice boards, media, online. |  |  |
| Our place in the community | To play an active role in our local community and the broader U3A community and be an effective advocate for our members | Continue dialogue with BVSC and education bodies. | Management Team |  |
| Explore options for regional U3A body. | Management Team |  |
| Seek opportunities for joint ‘projects’ with other U3As, and other local community groups. |  |  |
| Continue to play an active role in Seniors Week. |  |  |
| Social support | To acknowledge and build on the important role that U3A plays for the social support and wellbeing of members. | Formally recognise social interaction/fun as a U3A objective. |  |  |

**Attachment 5 – Communication Strategy**

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| **Objective/Task** | **Key Message** | **Target Audience** | **Frequency** | **Channel/Method** | **Key person** |
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