

STRATEGIC PLAN 2025 – 2030

PURPOSE

The purpose of U3A organisations worldwide is to enhance the lives of the Third Age community by connecting seniors to lifelong learning.

BELIEFS

- Lifelong learning contributes to a good quality of life.
- The Third Age is a special period of life with an opportunity for continued learning.
- An active mind and body moderate the aging process and maximizes the quality and duration of life.
- Sharing knowledge expands capacity.
- When we listen respectfully to others, we learn from them.
- Volunteering time, knowledge, and skills enhances well-being, as well as the well-being and joy of others.
- Learning in the company of others develops friendships.
- Working together as focused teams creates a vibrant and attractive organisation.

MISSION

Create a culture that supports and encourages members to improve their well-being by exercising their minds and bodies, and to view U3A as an integral part of their lives, helping them to achieve personal goals and ambitions.

Ensure that U3A has systems and processes in place that are both effective and efficient, with records that comply with legislation for not-for-profit organisations.

Create a self-sustaining organisation with an energetic membership, wide-ranging programs, and a sound financial base.

STRATEGY

Membership Strategy:

Objective: Strengthen members' involvement in planning and conducting the organisation's activities and retain or increase membership year by year.

How:

- Involve members in choosing activities and learning opportunities by following up on new members' preferences and surveying existing members.
- Ensure all members agree to a Code of Conduct – via membership application and renewal.
- Implement our Promotion Strategy.

Volunteers Strategy:

Objective: Encourage all members to volunteer their time and expertise:

How:

- Engage as many members as possible in conducting activities (committee roles, facilitators, tutors, record keeping, maintenance, event organisation, administration and other tasks).
- Participation in the management of the organisation and attending Annual General Meetings.
- Provide development and training opportunities for volunteers.
- Develop succession plans for key committee positions.

Program Strategy:

Objective: Conduct programs that appeal to current members and align with the needs of potential members:

How:

- Offer programs in the following categories:
 - Activity and social learning.
 - Creative Learning.
 - Financial management learning.
 - STEM learning (Science, Technology, Engineering and Mathematics).
 - Humanities learning.

- Regular lectures with wide appeal.
- University Studies in partnership with JCU.
- Identify individuals and groups willing to share their knowledge voluntarily.
- Develop programs in emerging disciplines (e.g., modern technology, medical advances).

Compliance Strategy:

Objective: Document and implement systems and processes that comply with legislation.

How:

- Educate the committee and others through training.
- Create and implement an operational manual.
- Conduct an annual audit of our financial statements (in alignment with the Finance Strategy).
- Manage records in accordance with legal requirements.
- Implement our Promotions Strategy.

Promotions Strategy:

Objective: Raise recognition of our brand and what we offer – lifelong learning.

How:

- Conduct open days periodically (at least one per year)
- Maintain promotional initiatives
 - Seniors Expo.
 - Information stands at malls or other relevant events.
- Run a 'bring a friend' campaign through existing members.
- Build and maintain relationships with community leaders and media, e.g. Townsville Bulletin Community Notices and Triple TTT.
- Update and enhance promotional materials.
- Explore or adopt additional communication channels (e.g. improving website capabilities).
- Implement Membership strategy initiatives.

Finance Strategy:

Objective: Conduct business with sufficient income, and retain earnings to meet current needs to ensure long-term financial stability

How:

- Encourage members to recognise the value of all classes and their contribution.
- Establish a Grants and Sponsorship team lead by a committee member, to seek funding from various sources.
- Set aside funds for regular upgrades of computers and other equipment.
- Create a reserve covering three years of operating costs to:
 - Meet Fiduciary obligations.
 - Protect current and future office bearers.
 - Maintain solvency.
- Implement annual audits and ensure all financial transactions through the U3A accounting system.

Office and Equipment Strategy:

Objective: Maintain a well-equipped office and suitable meeting and training facilities to support current future growth.

How:

- Open the office daily during advertised hours.
- Ensure office equipment meets current and future projected needs.
- Upgrade the website to enable direct interaction between members and the organisation.

Relationship with U3A Queensland:

Objective: Maintain a positive relationship with U3A Qld and consider their advice and support.

How:

- Encourage a local committee member to apply for a Qld committee position and help with information flow.
- Participate in U3A Qld insurance arrangements.
- Ensure the President is active in the U3A Presidents Group email communications.