

PURPOSE:

The purpose of U3A organisations world-wide is to enhance the life of the Third Age community through 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 opportunity for continued learning
- An active mind and body moderates the aging process and maximizes the quality and duration of our life
- Sharing our knowledge expands our own capacity as well as others'
- When we listen respectfully to others we learn from them
- Volunteering our time, knowledge and skills enhances our own well-being, as well as the well-being and joy of others
- When we respect our volunteers, our organization will thrive
- Learning in the company of others develops friendships
- Working together as focused teams creates a vibrant and attractive organization

MISSION:

Our mission as an organisation is to:

- Create a culture
 - to support and encourage other members
 - in which every member desires to improve their well-being through exercising their minds and bodies
 - in which members see U3A as an integral part of their daily life helping to achieve their own personal goals and ambitions
 - that has systems and processes which are both effective and efficient and keeps appropriate records which are compliant with the legislation for not-for-profit organisations
- Create a self-sustaining organisation with an energetic membership, far-ranging programmes, and a sound financial base

STRATEGY:

- **Membership Strategy: strengthen members' involvement in planning and conduct of the organisation and increase membership to 500 by end 2017 and 800 by end 2018,**

How:

- 1: **involve** our members in choosing activities and learning opportunities (following up on new members preferences, survey existing members)
 - 2: **ensure** all members agree to a Code of Conduct – via membership application & renewal
 - 3: **Implement** our Promotion Strategy
- **Volunteers Strategy: Encourage all members to volunteer their time and their expertise:**

How:

- 1: have a minimum of 10% of our members engaged the conduct of our activities (committee, facilitators, tutors, record keepers, maintenance of facilities and equipment, event organizers, administration tasks and other ad hoc needs of the organization)
 - 2: **provide** development and training for our volunteers
 - 3: **develop** succession plans for key positions on the committee.
- **Programme Strategy: Conduct programmes which are appealing to our current members and are in line with the needs of potential members:**

How:

- 1: **conduct** 50 programmes a week by the end of 2018, under the following categories:
 - Activity and Social learning
 - Creative Learning
 - Financial management learning
 - STEM learning (Science, Technology, Engineering and Math)
 - Humanities learning
 - Regular Lectures which are eclectic in nature and have a wide appeal
 - University Studies (partnership with JCU)
- 2: **identify** individuals and groups who are willing to voluntarily share their knowledge
- 3: **develop** programmes in emerging disciplines (Modern technology, Medical advances etc)

- **Compliance Strategy: document and implement systems and processes that are compliant with the legislation,**

How:

- 1: **educate** our committee and others about the legislation through Training
- 2: **create** and implement an operational manual
- 3: **annual audit of** our Financial statements, further to our Financial Strategy
- 4: **pass** all transactions through U3A accounting system, further to our Financial Strategy
- 5: **manage** our records as required by legislation
- 6: **Implement** our Promotion Strategy

- **Promotions Strategy: raise recognition for our brand and what we offer - lifelong learning**

How:

- 1: **conduct** periodic open days (minimum of one per year)
- 2: **maintain** promotion initiatives of 2017
 - Newspaper notices (weekly)
 - Seniors expo
 - Occasional information stands at malls or other events
- 2: **conduct** a bring a friend campaign through existing members
- 3: **maintain and build** relationships with community leaders and media outlets
- 5: **maintain and enhance** our promotional material
- 6: **investigate** (and adopt) other channels of communication with existing and potential members (e.g. 1. use of social media, 2. enhancing the capability of our web site)
- 7. **Implement** membership strategy initiatives

- **Finance Strategy: ensure that we conduct our business with sufficient income and retained earnings for current needs and maintain the organization in sound financial position.**

How:

- 1: **encourage** our members recognise that all our classes have a value and people need to contribute
 - 2: **establish** a 'Grants and Sponsorship' team headed by a committee member to apply for money from a variety of government and non-government organizations
 - 3: **set aside/quarantine** funds sufficient for the continuing upgrade of our computers and other equipment
 - 4: **create a reserve of** three years running cost (Approximately \$45,000.00); this will be done incrementally over time, aiming for the \$45 thousand by the end of 2020. This will ensure we have sufficient money to meet our fiduciary obligations under the legislation and protect current and future office bearers)
 - 5: **implement** Compliance Strategy annual audit and passage of all financial transactions through U3A accounting system
- **Office and equipment Strategy: have a well-equipped office, meeting and training facilities, sufficient for our current needs and the foreseeable growth of the organisation**

How:

- 1: **open** our office daily, at times advertised
- 2: **ensure** that our office equipment is of a standard that is aligned to our current and foreseeable needs
- 3: **upgrade** the website to allow for our members to interact directly with the organisation