

# BRIBIE ISLAND U3A INC

## Strategic Plan 2024 - 2029

### OUR VISION

Bribie Island U3A aspires to be a respected and valued service

### OUR MISSION

Bribie Island U3A is committed to creating and maintaining an inclusive, caring environment for members with a focus on lifelong learning, stimulating activities and sustainable practices.

### OUR MOTTO

The Joy of Learning





## Strategic Plan 2024-2029

# Introduction

The Strategic Plan 2024 – 2029 for Bribie Island U3A Inc provides a comprehensive roadmap for the organisation's goals and objectives over the next five years. The Plan is anchored in our U3A's Mission Statement as outlined on the front cover. The goals are aspirational and consistent with our Mission Statement. This alignment is crucial for the success of the plan as it ensures that the organisations overarching vision is supported by specific, measurable targets.

So how will we measure the success of our plan? Each Target Area has a list of Expected Results.

- Members will be able to judge the success of the Plan as they see whether or not these results are attained
- Management Committee members will feel able to use the Plan to guide the development of annual Implementation Plans with timeframes and responsibilities clearly outlined and progress towards the objectives evident
- The volunteer pool is of sufficient size to attain the goals set down in the Plan
- Volunteers will have clearly defined roles and they can expect to have training and professional development needs met in order to meet expectations
- Members can expect to be consulted regularly and to have their suggestions for improvement considered
- The organisation grows and changes to meet the challenges of the times

I am indebted to the Strategic Plan Sub-Committee for their invaluable contribution and countless hours they willingly gave to the development of the Strategic Plan. The Sub-Committee was chaired by Ms Gail Bonser, former President, U3A Network Queensland and also former President U3A Southern Gold Coast, and Bribie Island U3A Inc committee members, Greg Sibthorpe, Jenny Falknau and Michelle Kinnersly. The Sub-Committee has presented the Strategic Plan to the Management Committee, who will develop an Implementation Plan to deliver the actions of the Strategic Plan and ensure that Bribie Island U3A Inc can respond effectively to ensure that Bribie Island U3A's operations are aligned with the goals contained therein.

I would also like to extend heartfelt thanks to those who contributed valuable information to the Strategic Plan. These include the members of the U3A who responded to our survey and invited members who participated in the SWOT Analysis, Ms Gigi Lacey from Instinct Organisational Development Consultants, as well as Councillor Brooke Savage for her contribution. Your insights and perspectives played a crucial role in shaping the goals and objectives of the plan.

**Maree Mosslar**  
President



## Strategic Plan 2024-2029



# Goals, Targets and Expected Results

## Administration

The support of members and volunteers came high on the list of aspirations when devising the Goals and Actions within this target area. With the achievement of those aspirations and with an eye to the future in mind, the Actions have been geared to streamlining operations and ensuring that members and volunteers are the beneficiaries.

GOAL	Maximise organisation efficiency, secure use-appropriate accommodation and provide a welcoming and rewarding environment for volunteers and members
ACTIONS	<ul style="list-style-type: none"><li>• Investigate the establishment of a Registrar position with responsibility for membership</li><li>• Investigate the establishment of a Volunteer Coordinator position with responsibility for volunteer recruitment and management</li><li>• Develop and update role descriptions for key positions</li><li>• Establish succession planning for all key positions</li><li>• Redefine committee roles</li><li>• Provide training opportunities for volunteers</li><li>• Work cooperatively with IT specialists to make effective use of technology</li><li>• Explore options for current and future accommodation</li><li>• Investigate ways to improve member access to courses of choice</li><li>• Investigate the establishment of member feedback regarding course content and delivery</li><li>• Identify key stakeholders in government, other education providers and the community, and collaborate with them to meet essential needs</li></ul>
EXPECTED RESULTS	<ul style="list-style-type: none"><li>• A skills register is established</li><li>• Improved organisation efficiency</li><li>• Volunteers and committee members feel satisfied and valued</li><li>• An expanded volunteer pool</li><li>• An expanded pool of nominees for committee positions</li><li>• Effective application of technology</li><li>• Professional development and training for committee members</li><li>• Improved member satisfaction levels</li><li>• Course enrichment for members and tutors</li><li>• Course offerings regularly reviewed</li><li>• Current and future accommodation needs are met</li><li>• Regular reviews of current practice</li><li>• Relationships with key stakeholders are enhanced to the benefit of Bribie Island U3A</li></ul>





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# Communication and Marketing

Members have indicated that they are generally satisfied with the way in which the organisation communicates with them. Externally, our U3A and the movement generally is not recognised for the potential benefits that it can bring by way of social interaction, learning and the retention of physical and mental fitness into old age. The actions within this target have been devised to ensure effective communication and promotion of activities both internally and externally.

### GOAL

Ensure effective and timely communication. Promote U3A in the community.

### ACTIONS

- Investigate the appointment of a Communication and Marketing Officer and team
- Establish an annual communication and marketing plan
- Request advice from stakeholders about communication shortfalls
- Establish a tutor leadership structure
- Regular testing of awareness and perception of U3A
- Keep external stakeholders informed about Bribie Island U3A and its activities and collaborate with them to meet essential needs

### EXPECTED RESULTS

- Optimal internal and external communication and marketing
- A workable communication and marketing plan
- Heightened tutor involvement in communication and marketing
- U3A becomes better known for its contribution to the community
- External stakeholders are supportive





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## Innovation

To remain viable and sustainable into the future and to ensure efficiency and best practice, the organisation needs to be innovative – “and to keep up with the times.” As current retirees, who will form the bulk of membership into the future, have come from a working environment that values innovation and efficient and effective practice, so must this organisation.

### GOAL

Implement processes supported by appropriate infrastructure, to improve operational efficiency and member convenience

### ACTIONS

- Investigate the feasibility for an improved membership and class management system
- Implement appropriate technologies to improve administrative processes
- Review the website design
- Ensure that our infrastructure is capable of meeting course requirements
- Create an infrastructure support team
- Explore possibilities for offering alternative methods of delivering courses in the future
- Identify courses and tutors in contemporary technical fields

### EXPECTED RESULTS

- An implementation plan for an improved membership/class management system is formulated and executed
- Users have remote access to the membership and class database
- A more efficient and convenient enrolment and membership process
- Greater member autonomy and use of self-service
- Enhanced operational processes
- Increased volunteer confidence in utilisation of pertinent technologies
- Avenues are created for members to enhance their proficiency in contemporary technology skills







## Strategic Plan 2024-2029

# Social Connections and Cohesiveness

Social connection underpins the foundation of the U3A movement. At Bribie Island U3A we aim to promote social connections and cohesiveness – our aim is to ensure that we are a friendly and accepting organisation where our members always feel welcome and valued and the efforts made by our volunteers are recognised and rewarded

### GOAL

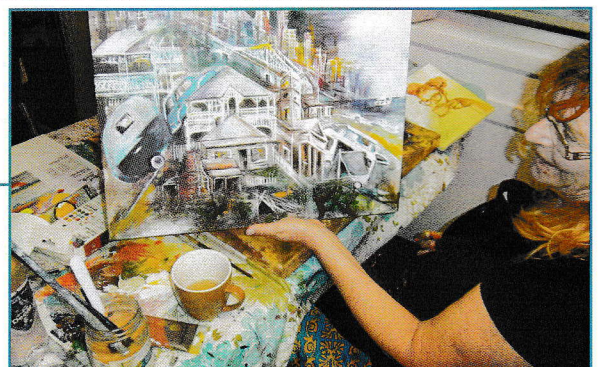
To encourage social connectedness by providing a range of stimulating activities and encouraging a sense of togetherness

### ACTIONS

- Investigate the recruitment of a dedicated Social Activities Organiser and the establishment of a Social Activities Team
- Enable funding of social activities to be held several times a year
- Ensure that tutors are encouraged to acknowledge new members
- Investigate Reward systems for tutors and other volunteers
- Publicise positive member experiences
- Conduct regular social activities, including welcome to new member events
- Regularly invite member feedback
- Investigate the introduction of a designated Welfare Officer position
- Stay abreast of public transport availability

### EXPECTED RESULTS

- Increased social activity for members
- The budget includes an allocation for social events and welfare activities
- New members experience increased feelings of inclusion
- Volunteering is rewarded and publicised
- Positive member experiences are publicised
- Regular surveys are conducted





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## Sustainability

The viability and sustainability of Bribie Island U3A depends on many factors including its management of risk, its financial health, the attractiveness of its programmes, the sufficiency of its pool of volunteers, security of appropriate accommodation and its capacity to maintain sustainable practices that enable it to meet its legal obligations and the standards and expectations of its community.

### GOAL

To maintain the viability of U3A and ensure it continues to adequately service its community

### ACTIONS

- Develop and regularly review and update a risk management plan
- Maintain the financial health of the organisation
- Undertake regular reviews of the programme
- Ensure sufficient infrastructure to support programmes
- Ensure availability of adequate volunteers
- Regularly review the membership numbers and the demographics that support them
- Nurture relationships with external stakeholders
- Consider the environmental impacts when decision-making
- Establish annual financial budgets and maintain annual audits

### EXPECTED RESULTS

- The risk management plan is regularly reviewed and updated
- The management committee has sufficient information to make responsible decisions and meet its legal requirements
- The U3A meets all legislative requirements
- Appropriate financial budgets are prepared
- Professional advice is sought, and appropriate investment yields are adequate
- An active recruitment practice for tutors
- An expanded volunteer pool
- Quality programmes for the U3A
- Adequate infrastructure is secured
- Member requirements are met
- Increased opportunity for members to participate in classes of their choice
- Operations are environmentally sustainable







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