

LEARNING IN RETIREMENT ORGANIZATIONAL GOALS 2015/2016

STEERING COMMITTEE

A. Ongoing:

- A1. Serve as the governing body of LIR
- A2. Approve and coordinate the goals and activities of the Standing Committees
- A3. Maintain partnerships with appropriate organizations
- A4. Keep membership informed of LIR goals and accomplishments
- A5. Utilize technology to facilitate communication, improve efficiency and reduce costs
- A6. Annually review "The Relationships Between the University of Wisconsin Oshkosh and the Learning in Retirement Organization" document on or before July 1

B. Fiscal Year 2015/16:

- B1. Try to resolve parking issues at Lincoln Hall and the university at large
- B2. Continue current corporate relationship with Evergreen Retirement Community and Bella Vista
- B3. Investigate new locations for classes on the UW Oshkosh campus

MEMBERSHIP COMMITTEE

A. Ongoing:

- A1. Maintain minimum membership target of 275.
- A2. Conduct annual survey of non-renewal members, quantify reasons for non-renewals, review strategies for membership retention, and provide written report to the membership committee.
- A3. Send welcome letter and an orientation booklet to new members as they join.
- A4. Follow-up on initial inquiries from those who do not join.
- A5. Continue to implement logos on publications and website.
- A6. Continue brochure placement in all appropriate locations.
- A7. Promote wearing of name tag at all programs.
- A8. Greet and socialize with all members at LIR activities, especially bus trips and luncheons.
- A9. Submit articles for local newspapers and other appropriate publications both print and online.
- A10. Identify locations, make arrangements, and schedule staffing for informational display tables.
- A11. Continue annual listings in senior resource directories.
- A12. Coordinate the fall luncheon.
- A13. Assist with the annual meeting.
- A14. Request all program presenters and coordinators to recognize guests and new members attending programs.
- A15. Continue "Share the Experience" program
- A16. Continue to recruit new members from Appleton, Neenah, Menasha, Fond du Lac, and outlying areas.

Fiscal Year 2015-2016

- B1. Create subcommittee to work on updating, creating, and presenting LIR Power Point.
- B2. Develop a permanent relationship with the Alumni Office for promoting LIR activities.

CURRICULUM COMMITTEE

A. General Goals

- A1. Represent the Curriculum Committee at the LIR Steering Committee and other meetings.
- A2. Design courses and other programs that reflect and satisfy LIR membership educational, cultural and other life-long learning needs.
- A3. Overtly recognize and say thanks to guest presenters and service organizations and their personnel who have shared their knowledge and experiences with the LIR membership.
- A4. Ensure two-way communication with the LIR President and with the other committees of the organization.
- A5. Continue the close liaison working relationship with the UW-Oshkosh LLCE to enhance the effectiveness of serving member needs.
- A6. Foster full membership participation and ownership of Curriculum Committee Goals, Objectives and other accountabilities.
- A7. Continue the use of ad hoc sub-committees-tours, policy updates, program logistics, etc. as needed, to further Committee Goals and Objectives.
- A8. Periodically review and revise committee income and expenditure activities with the objective to maximize savings and income where possible.

B. Fiscal Year 2014/15 OBJECTIVES

- B1. Plan, organize and implement LIR programs – courses, tours, etc.
 - Offer a minimum of 50 courses per semester and 10 tours per semester
- B2. Add 5 New Coordinators
- B3. Periodically review the Committee's performance in meeting the LIR organization's overall mission, and make changes as are necessary.
- B4. Prepare and present the Curriculum Committee's 2015/16 Annual Report
- B5. Prepare and propose the 2016/17 Curriculum Committee Goals and Objectives.

ADMINISTRATION/FINANCE COMMITTEE

A. Financials

Ongoing

- A1. Year-end (June 30) operating balance target range of \$20,000 - \$30,000.
- A2. Review membership fees as necessary.
- A3. Propose fiscal year budget annually in May.
- A4. Review policy for determining course fees and modify as necessary.
- A5. Minimize costs for AV and room rental by utilizing free facilities

A. Operations

Ongoing

- A1. Annual strategic planning process with committee input.
- A2. Develop and revise documentation including flow charts for key processes.
- A3. Review Bylaws and Policies and recommend changes as needed.
- A4. Update the Administrative Handbook and Operational Resource Handbook as changes are made.

A. Utilization of Computer Technology

Ongoing

- A1. Enhance utilization of computer technology.
- A2. Identify additional information to be maintained on our web site.
- A3. Identify opportunities to use email to communicate with members.
- A4. Update membership data base and profile graphs October 1st.

B. Fiscal Year 2015-2016

- B1. Identify and review UW-Oshkosh software available to improve processes and refine workload related to membership data base and course registration.
- B2. Develop a plan for the implementation of online course registration option for members July 2015.
- B3. Develop a plan for the implementation of online payment for membership and fee based courses July 2015.
- B4. Identify new data base needs.