



BANYULE
UNIVERSITY OF THE THIRD AGE

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U3A BANYULE 2022-2024 STRATEGIC PLAN

FINAL REPORT ON THE IMPLEMENTATION OF THE PLAN

This was the third strategic plan of U3A Banyule Committee of Management. It was prepared at the beginning of 2022 supported by a community grant from Banyule City Council. The process of development included a member survey and focus groups, and meetings of the Committee of Management resulting in: updates to the Vision, Mission and Values; identification of several overarching goals; and detailed action statements.

During the period of implementation several new actions were initiated and added to the Plan. We have gained five BCC grants during the period of the Strategic Plan to assist with the achievement of our goals.

This is the final report detailing achievements during 2022-2024, structured under the 5 Overarching Goals of the Plan:

1. To effectively govern and manage the organisation to enable us to remain viable and vibrant.
2. Manage membership growth to reflect more closely the demographics of the Banyule community, with a focus on increasing male and multicultural membership.
3. Our courses aim to meet the needs of our members, by providing high quality learning, activity and social opportunities, in a welcoming environment.
4. To provide safe and 'fit for purpose' venues that enables us to be highly responsive to the accommodation needs of members, courses and the organisation.
5. To be highly responsive to the technological needs of members and the organisation.

Overarching Goal 1: To effectively govern and manage the organisation to enable us to remain viable and vibrant.

Priority Actions

1. Review the Committee and Sub Committee structure
2. Strengthen our relationships with community organisations
3. Utilise and upskill our members and volunteers to support Committee of Management and organisational processes
4. Develop processes of induction for new appointees

5. Clarify lines of communication and communication processes between the Committee of Management and Support Role members
6. Build a culture of teamwork for Committee of Management and Support Roles
7. Introduce increased processes to ensure transparency of financial and governance processes
8. Update the Constitution to ensure its relevance to current U3A Banyule needs and processes.
9. Review administrative office processes
10. Review the process of enrolment and fee payment for 'enrol and pay' events

Achievements

- A Vision statement was developed and the Mission and Values statements were updated based on member survey responses and focus group discussions.
- The organisation structure has been revised with updated Terms of Reference for the Committee of Management, Sub Committees and teams.
- The Constitution was reviewed to identify inconsistencies, omissions, and variations from our practices. A comparison to the 2023 Consumer Affairs regulations was also undertaken. Several changes to our practices and to the Constitution were subsequently implemented in 2023.
- Lines of regular communication were established with ILCH and BCC and there has been a substantial increase in liaison with the Mayor, BCC Councilors and staff and U3A representation on BCC committees and working groups. We participated in the BCC positive ageing 'Age is just a number' video and became a signatory to the 'Every age counts' campaign. We contributed to the development of the *BCC Ageing Well Framework 2024-2028* and the draft *Municipal Public Health and Wellbeing Plan*.
- We have facilitated fund raising activities resulting in donations totalling \$6421 to twelve not for profit community organisations, including \$2,145 to the Banyule Community Fund.
- We have maintained active involvement with U3A Network Victoria including hosting regional meetings and participating in the October 2022 and 2024 conferences.
- To increase member involvement and provide for the needs of members several new volunteer roles and teams have been created to support the work of the organisation.
- All Position Descriptions have been reviewed, clarified and updated and new roles were documented.
- Guidelines, Manuals and training processes have been updated.
- More detailed annual induction and update seminars were conducted for CoM and Support Role Members.
- A detailed Policy review and update was completed. A series of articles on policies was included in Omails to inform members.
- Feedback was sought from Support Role Members resulting in improved communication including the circulation of Committee of Management minutes, agenda and agenda papers. Support Role Members are included in Committee of Management training sessions and socially to forge far better communications
- To acknowledge the achievements and contributions of members we have increased publicity through Omails and comprehensive Newsletters.
- An increasing number of Members and Tutors have been acknowledged through nominations from the Awards Sub Committee for U3A Life Membership and Significant Service awards, in addition to external awards from U3A Network, BCC and Jaga Jaga. The Edna Bird Annual Award was

introduced in 2024 to acknowledge a member who has demonstrated outstanding qualities of friendship, community and connection.

- More substantial Annual Awards celebrations have been conducted to acknowledge all volunteers and award recipients.
- The financial year was changed to commence on 1 January instead of 1 July and an external financial review process was introduced.
- 'Pay and enrol' events are now successfully managed using 'Try Booking' following training of tutors, Office Volunteers and members.
- Administrative Office procedures have been extensively streamlined and updated. Detailed manuals have been completed and regular Office Volunteer training seminars have been introduced in addition to a mentoring process.
- Development of the 2025-2028 Strategic Plan was commenced.

Overarching Goal 2: Manage membership growth to reflect more closely the demographics of the Banyule community, with a focus on increasing male and multicultural membership.

Priority Actions

1. Implement a strategy to increase the number of men within our membership
2. Develop a strategy to attract members and tutors from a multicultural background, through greater community engagement
3. Retain and attract new members by re-designing the website
4. Develop and administer an online member survey to identify satisfaction with services and resources and needs of members, with a focus on courses
5. Cross-advertise activities for U3A Banyule and other seniors' groups

Achievements

- Monitoring of membership growth occurred in 2023/2024 to ensure U3A Banyule services, including the course program, could meet demand. The membership grew by 6% during 2022 – 2024 (860 to 912). The number of new members who joined during 2022 – 2024 was 658, compared to 417 new members in the preceding three years (2019 – 2021) reflecting a 'bounce back' in the years following the pandemic. Currently membership promotion has not been necessary, due to this gradual growth.
- Strategies to monitor and increase male membership have been introduced. Whilst the percentage of males in total membership remained steady at 22% during 2022 – 2024, 26% of new members in 2024 were male, indicating a promising trend.
- BCC funding was received to review and redesign the website, resulting in a contemporary, informative and navigable site.
- An online survey to identify member satisfaction with services and resources and the needs of members was completed in 2024. Actions arising from the survey were considered by CoM and will be incorporated in the next Strategic Plan, where applicable.
- Activities of U3A Banyule (including the course program), U3A Network Vic, BCC and other Banyule seniors' groups are regularly promoted in Omails to members, newsletters and the website.
- Seniors' week activities to promote healthy aging and U3A Banyule activities have been conducted for the Banyule community.

Overarching Goal 3: Our courses aim to meet the needs of our members, by providing high quality learning, activity and social opportunities, in a welcoming environment.

Priority Actions

1. Develop a system of rationalisation of the courses and enrolments
2. Implement a system of rationalisation of course enrolments
3. Develop a strategy to modify the program quickly due to adverse events
4. Identify opportunities for greater socialisation where possible
5. Identify the course needs of members, including emerging technologies
6. Implement the findings of course needs' survey

Achievements

- Many new courses and lecture series have been added to expand the depth of continuing education opportunities for members. New tutors have been engaged to replace retired tutors; waiting lists have been addressed and reduced.
- A new system has been implemented to rationalise course enrolments: members are only accepted from a reserve list after they have renewed their membership. Tutors have been mentored in the management of their waitlists, and new classes have been implemented to meet the need of the growing membership.
- In response to feedback from members via the 2024 satisfaction survey a decision was made to restrict enrolment in a maximum of two exercise classes was introduced to enable as many members as possible to participate.
- Updated processes to streamline roll-over enrolment into courses was introduced.
- Opportunities for social interaction of members has been implemented including afternoon teas following some lectures.
- Feedback from the 2024 member survey relevant to course delivery has been reviewed.

Overarching Goal 4: To provide safe and 'fit for purpose' venues that enables us to be highly responsive to the accommodation needs of members, courses and the organisation.

Priority Actions

1. To ensure the membership are effectively informed about the facilities
2. Monitor tutor and member satisfaction with venues
3. Source more venues to accommodate new classes and expanding needs of popular courses
4. Supplement and update equipment to support administrative and class delivery needs.

Achievements

- Information related to Facilities, Covid Management etc is distributed via Omail and mail out to members on a need's basis by Health & Safety Coordinator and/or President.
- The Course Coordinator and Venues Coordinator address Tutor and Member queries as they arise.
- Additional and appropriate venues have sourced as required.
- Regular meetings occur with BCC and ILCH staff to develop contracts and address issues including building safety and classroom technology.

- A submission on the draft BCC Infrastructure Plan was submitted to detail our current and future venue requirements.
- We have purchased new equipment to support administrative and course delivery including a piano, office chairs, computers, a blue ray DVD player and a microphone.

Overarching Goal 5: To be highly responsive to the technological needs of members and the organisation.

Priority Actions

1. Ascertain interest and offer regular classes on technology
2. Offer training session for Committee of Management members to better navigate MyU3A system
3. Expand the technology trainers' group to train the membership
4. Research the equipment required to run hybrid classes
5. Monitor tutor and member satisfaction with audio-visual equipment in venues
6. Monitor tutor need for more technology training
7. Monitor member need for more training

Achievements

- Technology courses were conducted for members.
- All Tutors have been provided with an opportunity to practice using the audiovisual technology at ILCH. Technical classroom support is provided for first time and guest presenters.
- Training in the use of MyU3A has been provided to all CoM, Support Roles and Office Volunteers.
- Extensive manuals to guide the use of MyU3A have been developed.
- We have introduced a Google drive to replace the file storage in Dropbox.

Ratified by the U3A Banyule Committee of Management on 8 November 2024