

FIVE COLLEGES LEARNING IN RETIREMENT

STRATEGIC PLANNING REPORT Spring, 2022

In 2021-2022, Five Colleges Learning in Retirement (LIR) Council appointed a Strategic Planning Committee. The scope of the committee was to provide insight and direction for the future enhancement of LIR programs and to indicate the satisfaction of members.

AD HOC STRATEGIC PLANNING COMMITTEE

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Introduction

In 1988, 5CLIR held its first peer-led seminars. This month the organization is on the brink of the thirty-fifth year of offering seminars. The last stock-taking of the membership occurred in 2014, and the last strategic planning report was issued in 2003. Council decided it was time to review how 5CLIR is doing. **After extensive fact-finding and careful self-assessment, we can say that 5CLIR is doing well.**

5CLIR continues to offer a variety of programs and events for its membership. It is financially healthy. The financial health of the organization can be found in the FY23 budget and the FY22 final income and expense statement. It should be noted that FY21, FY22 and FY23 were reduced due to Covid and not meeting in person. Additionally, operating fund deficits were covered with withdrawals from the investment fund. Total membership has been reasonably stable. While regular information is collected on total membership and finances, there is information that has not been collected and would be useful moving forward. With that in mind, basic demographic information of the current membership was collected. (See Section 1)

In addition to basic information, a sense of how the membership makes use of 5CLIR's offerings was warranted. For example, what are the most popular offerings? What is it about 5CLIR that the members most appreciate? (See Section 2) The satisfaction of the members is essential if the organization is to retain members and recruit new members. Also essential are the volunteering efforts of the membership. Therefore, an understanding of the volunteering efforts of the members was sought. (See Section 3) This information will allow a better position to promote and recruit volunteers needed to keep 5CLIR vibrant.

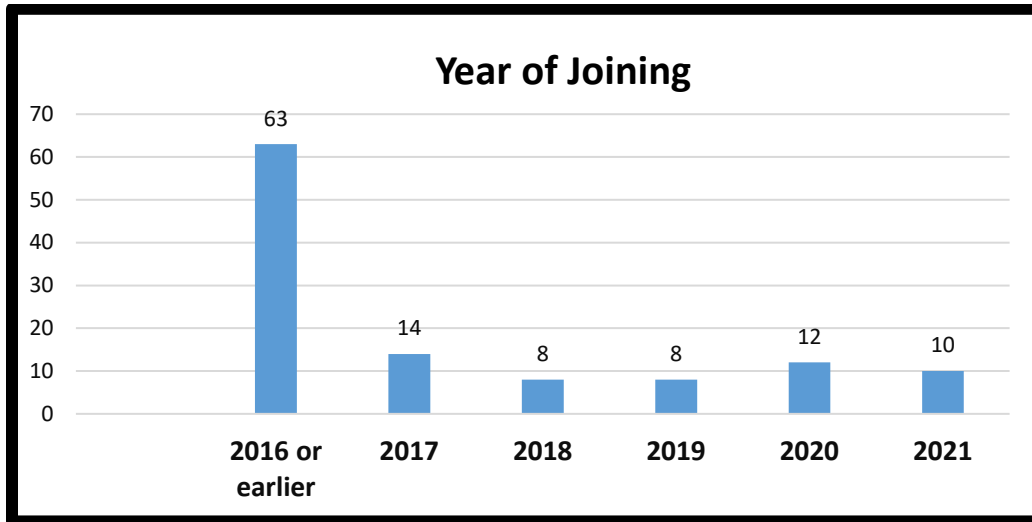
Information was also collected to develop a marketing strategy. (See Section 4) For the information to be useful, it should include both the raw data and the meaning of the results. This is necessary to provide recommendations for the Council to review. (Recommendations for Council are posted at the ends of Sections 1, 3 and 4)

The Strategic Planning Committee began its work at the end of 2021 and continued with weekly meetings until completing this report in June, 2022. Three surveys were used. One was sent to the entire current membership of 5CLIR. Another survey was sent to members who were identified as volunteers – people who moderated

seminars, served on committees or on Council, officers, and others who volunteered in other capacities. A third survey was sent to former members.

The response rates of the Member Survey and the Volunteer Survey were seventy-six percent and sixty-one percent, respectively. Credible information can be assumed from the response rates of the current members. The response rate of the former Member Survey was low, possibly limiting the strength of the interpretations taken from this target group.

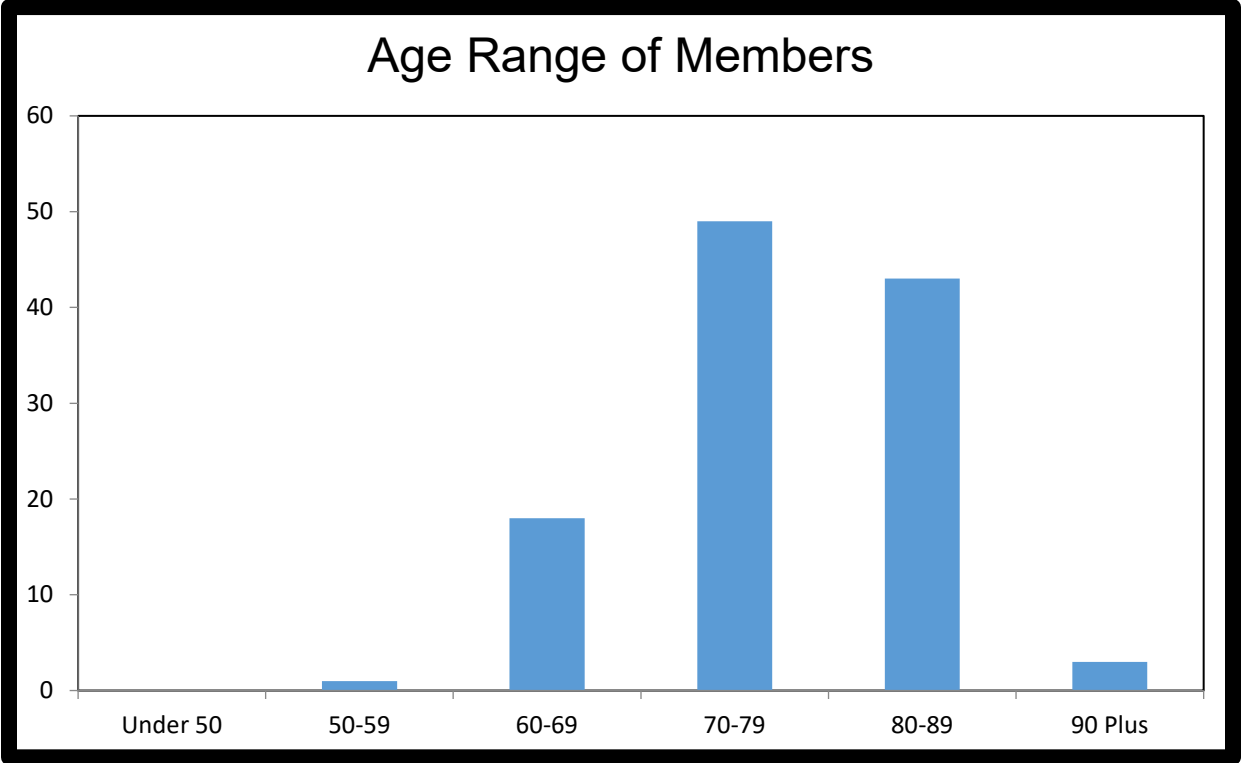
Section 1: Membership Profile



The respondents were asked what year they joined 5CLIR. A majority, fifty-five percent of the total respondents, joined in 2016 or earlier. Between seven and twelve percent joined each year from 2017 to 2021. The lowest numbers occurred pre-Covid pandemic and during the pandemic there was a recovery toward the 2017 level.

Membership from 2016 to 2020 was as follows:

2016	247
2017	290
2018	278
2019	245
2020	265



Most respondents are in their 70s or 80s. The average age of a 5CLIR member according to the survey is 77.

Likewise, the data from the Former Member survey shows a similar age range.

Former Members Age Range

	50-59	60-69	70-79	80-89	90 Plus
2016 or earlier	0	2	25	33	3
2017	0	4	6	4	0
2018	0	1	4	3	0
2019	0	2	5	1	0
2020	1	4	5	2	0
2021	0	5	4	1	0

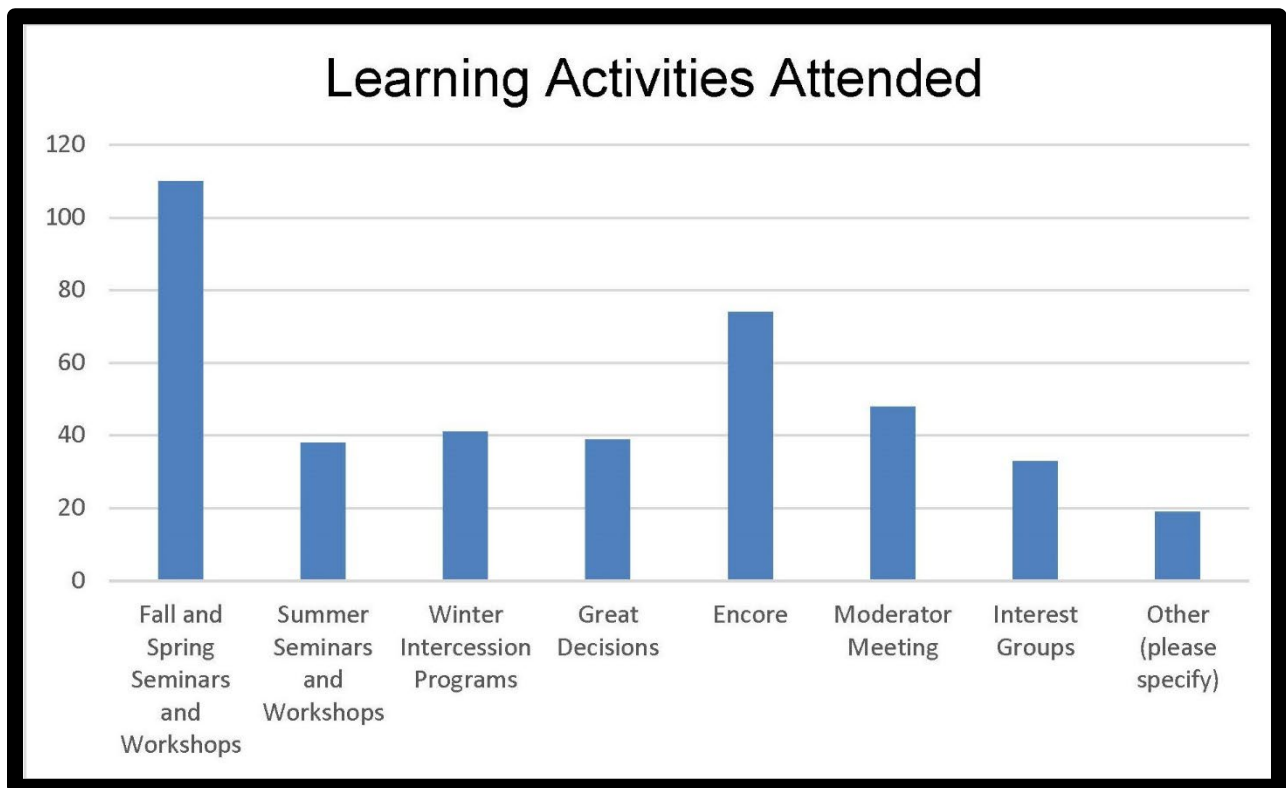
Section 2: Member Engagement and Satisfaction

The programming of 5CLIR is wide-ranging. At the heart of the offerings are the 10-week-long fall and spring seminars and workshops. In the summer, shorter-than-10-week seminars and workshops are held. Other learning activities are offered during the winter intersession. Twice a year the Encore program features signature presentations from the previous 10-week fall and spring seminars. Ongoing interest groups transcend the semester boundaries.

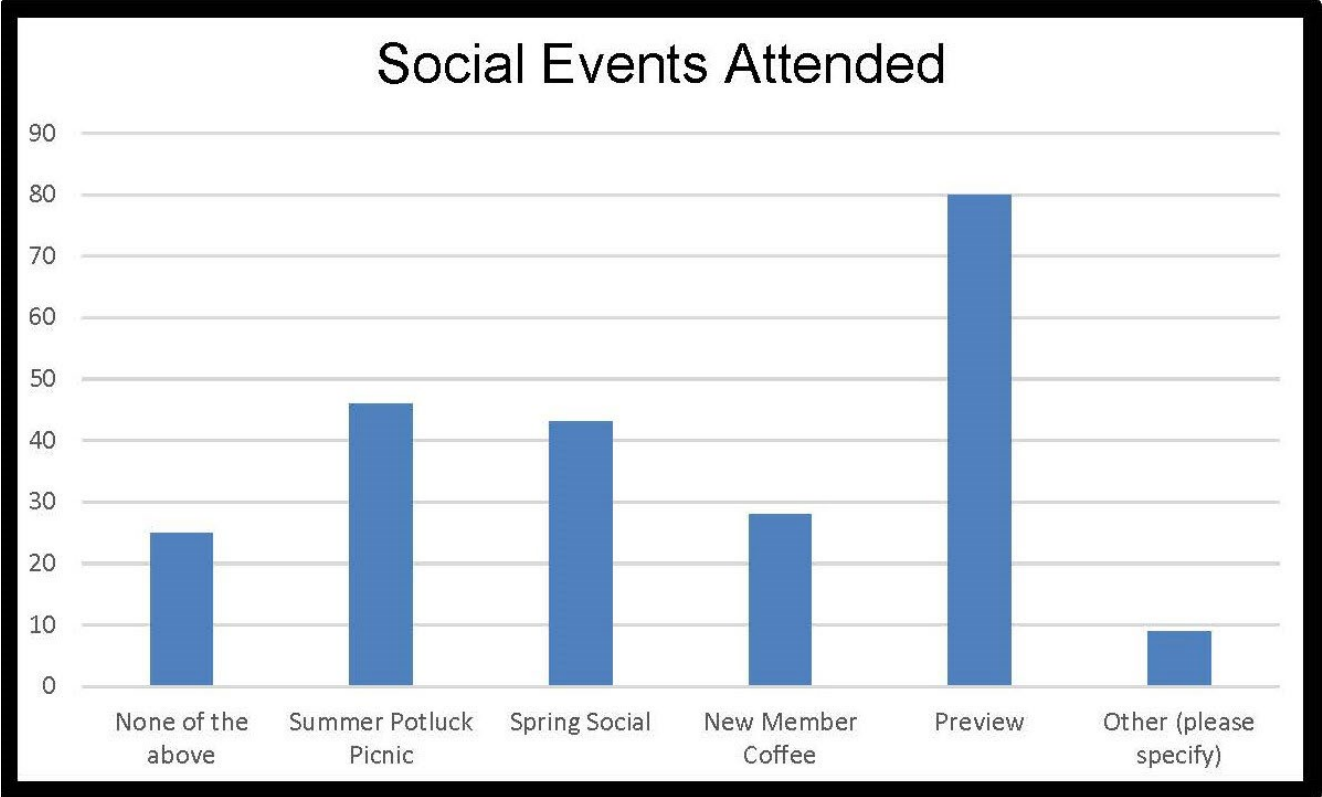
In addition to activities focused on “learning,” 5CLIR has, prior to the pandemic, mounted a variety of social gatherings such as the summer potluck picnic, the spring social, and a new members’ coffee. Twice a year a preview combines a convivial gathering with a rolling out of the catalog of seminar/workshop offerings for the upcoming fall or spring semester.

Surveys Sent to Current Members

Current members responded to questions regarding participation in learning and social activities.

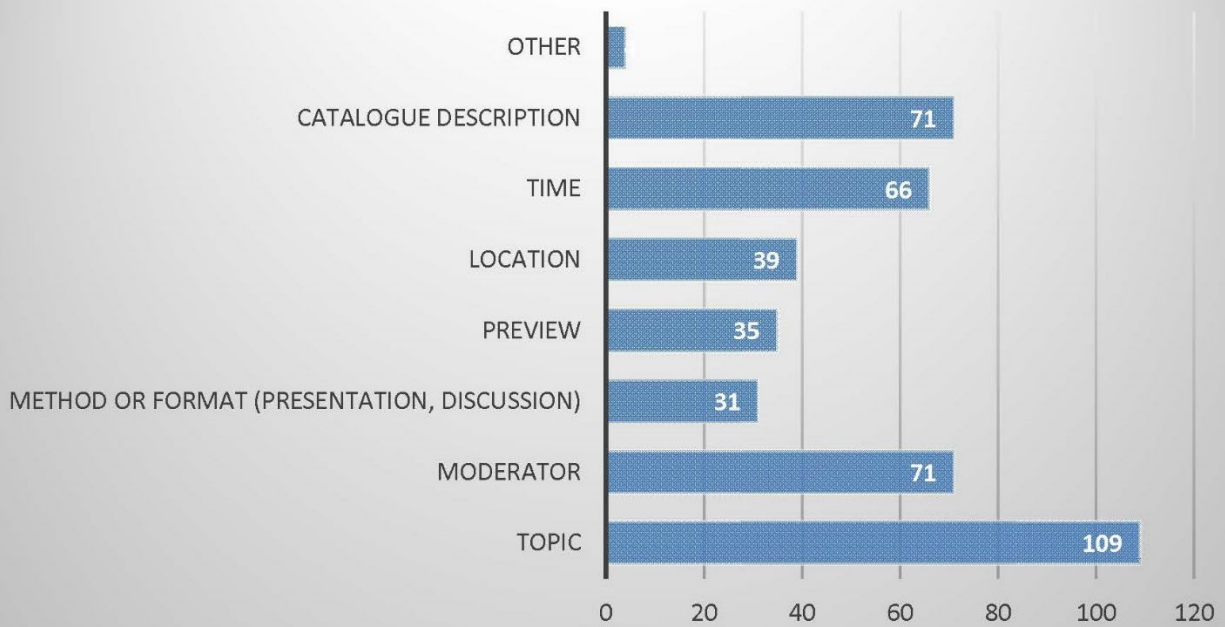


About ninety-seven percent of the respondents indicated they enrolled in the fall and spring seminars. The next most popular activity was the Encore presentations with sixty-five percent of the respondents attending these presentations.



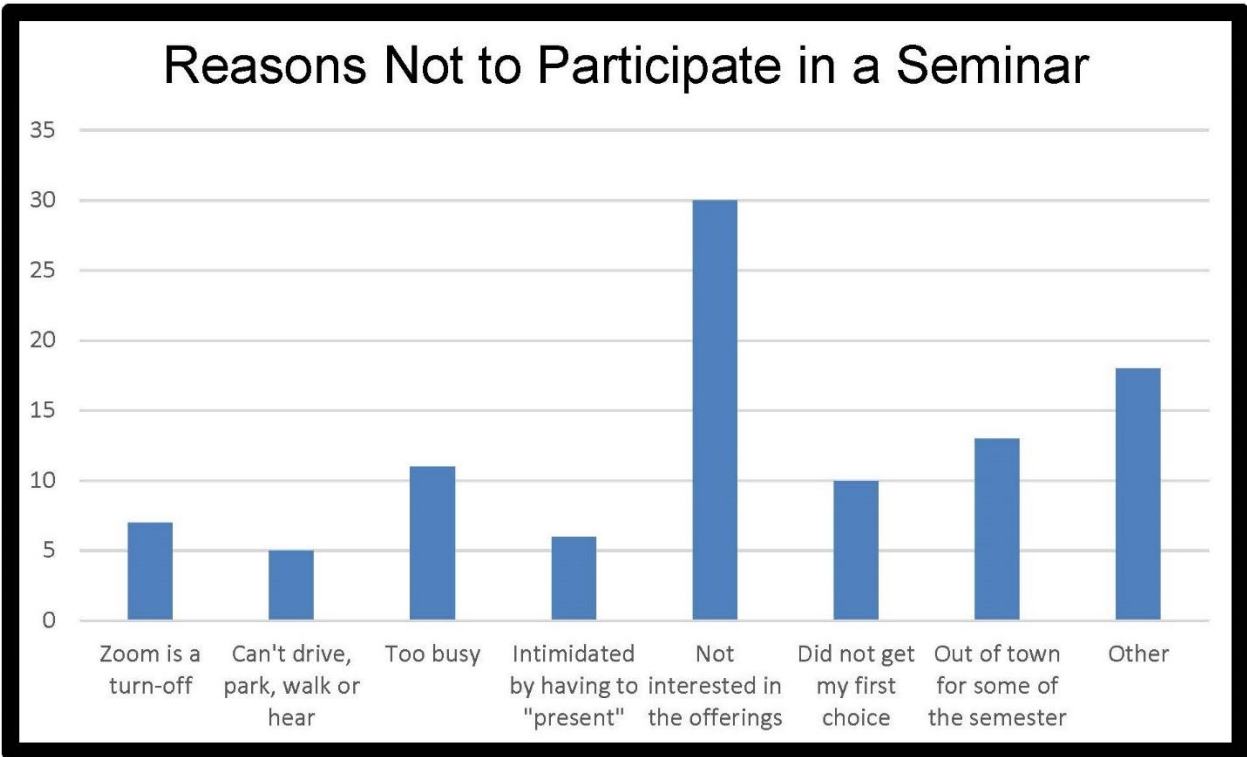
The message that 5CLIR members are clearly focused on learning is underscored by the finding that the most popular social event was the Preview with seventy percent of the respondents attending. The next most popular social events were the summer potluck and the spring social. It is worth noting that while twenty-two percent said they did not attend any of designated social events, some seminars and workshops include a social event to wrap up the seminar.

Criteria for Choosing Seminars



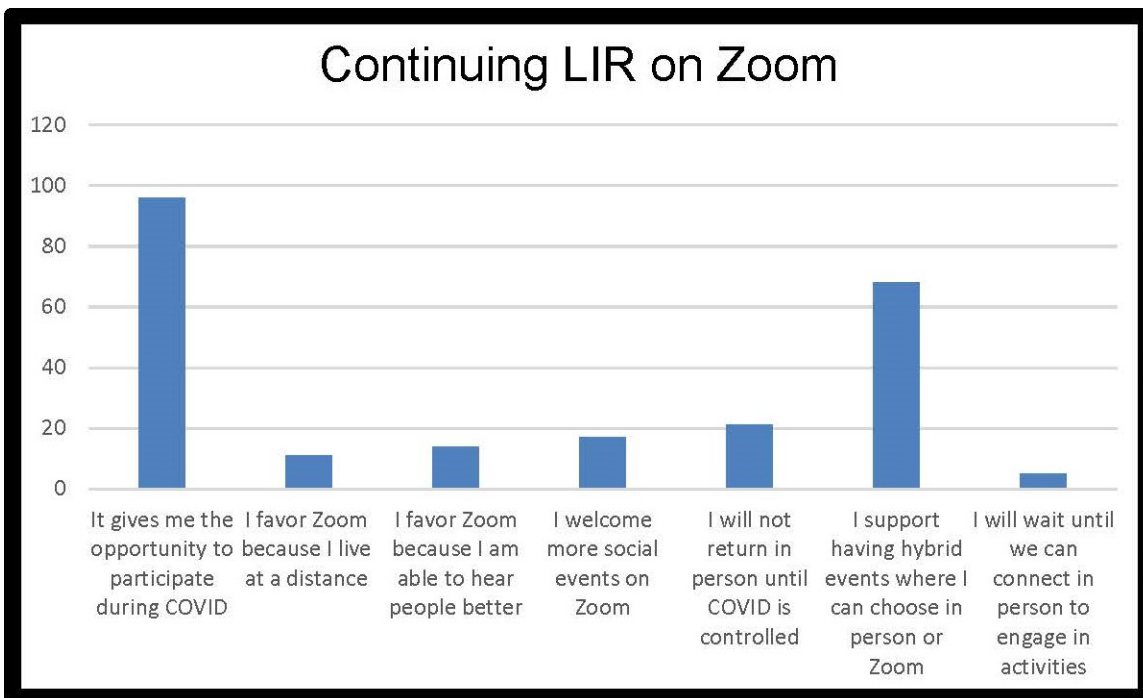
Nearly all of the respondents, ninety-six percent, said the most significant reason for choosing a seminar was the topic. The catalog description and the moderator were also important factors. The format of the seminar was relevant for twenty-seven percent of the respondents. The location was a significant factor for only thirty-four percent of the respondents.

In the comments to the question one respondent wrote, "location would be a secondary pre-COVID criterion." Physical impairments were noted as factors in making a choice by two respondents.



As most people seemed satisfied with the options, fewer than half the respondents answered this question. The most common answer was "not interested in the offerings."

Only twelve percent of those who did respond to the question said that Zoom was a turnoff.



When members were asked, "How do you feel about continuing 5CLIR offerings with Zoom?", nearly all of the respondents answered the question. Most, eighty-six percent, were positive about how Zoom gave them the opportunity to participate during Covid. Less than fifteen percent of the respondents said that they will wait to engage in person until the Covid threat is abated. Sixty-one percent of the respondents welcome a hybrid mode.

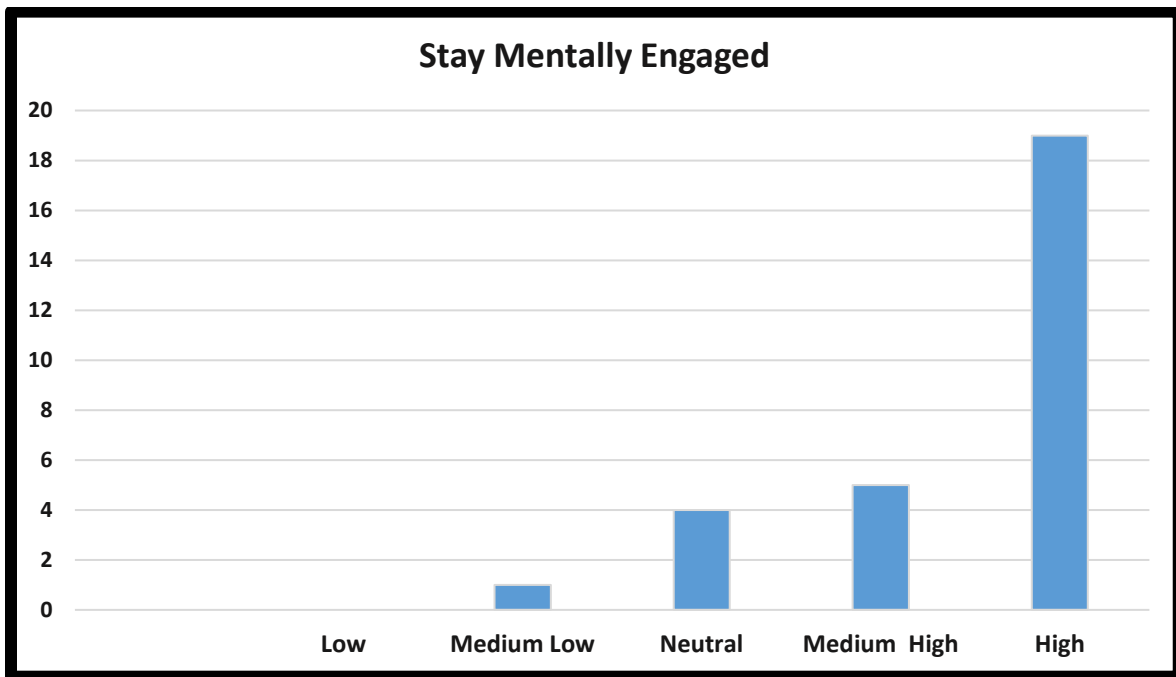
Respondents were asked to rate their interest in participating in 5CLIR.

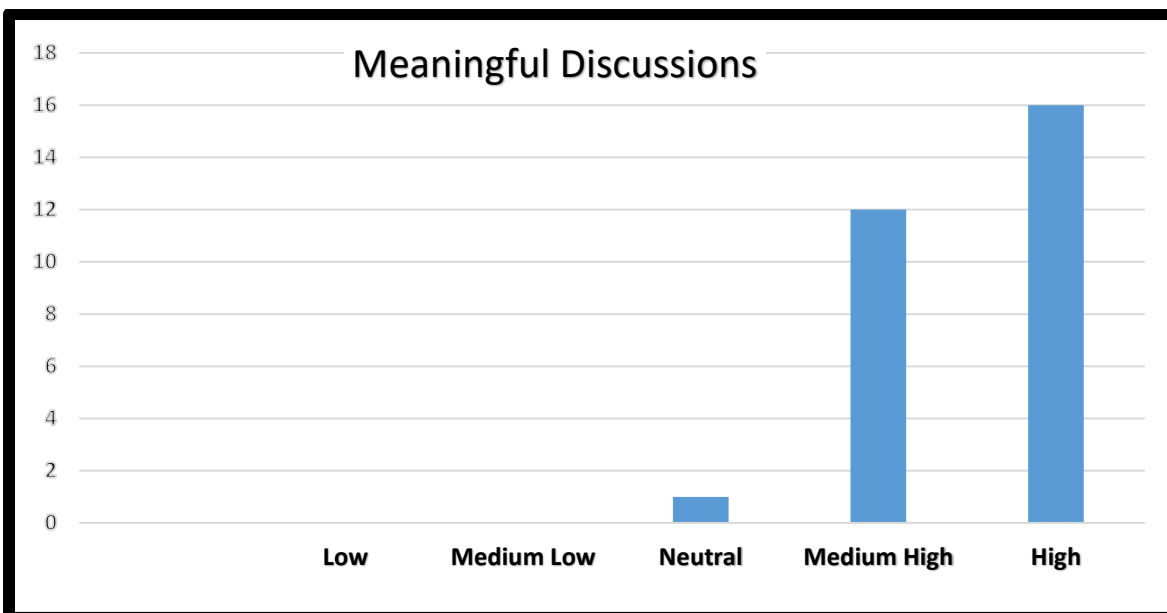
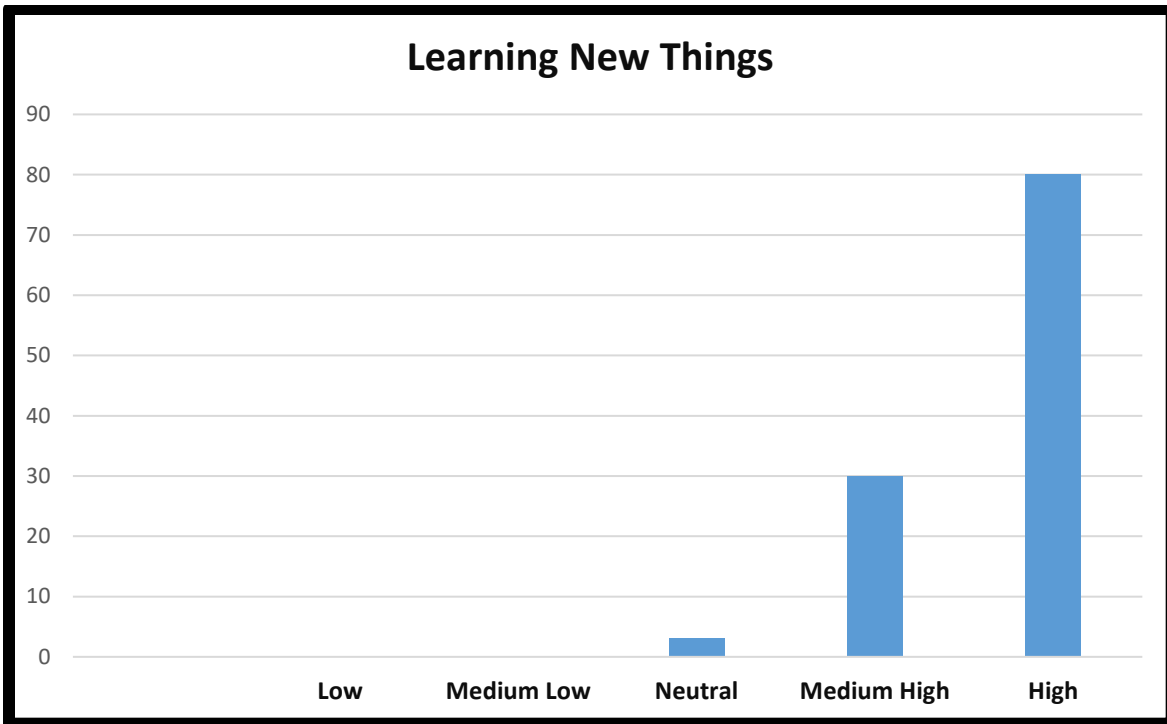
These responses were scored on a scale of 1-5 for low to high interest. Attributes that received the strongest scores were those related to engagement:

- Staying mentally engaged – mean score 4.71
- Learning new things – mean score 4.66
- Having meaningful discussions – mean score 4.47
- Sharing with others – mean score 4.41

Socially related attributes achieved lower ratings:

- Making friends – mean score 3.67
- Sharing experiences and memories – mean score 3.65
- Socializing – mean score 3.57

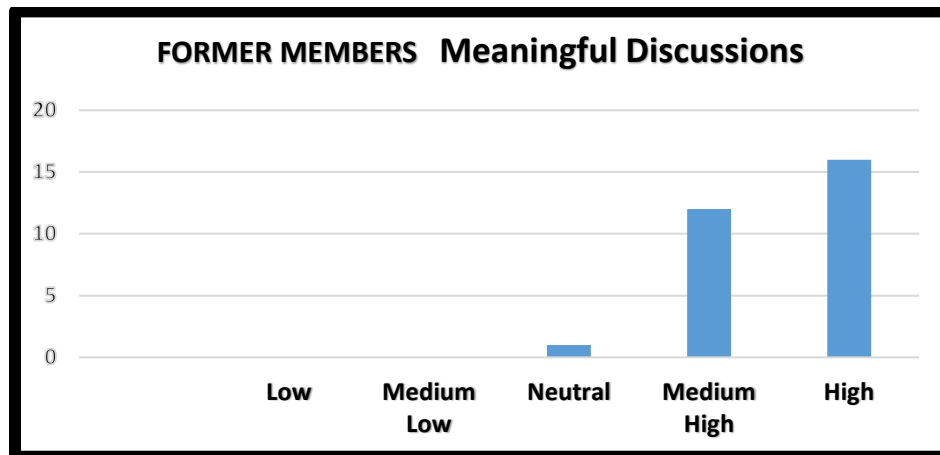
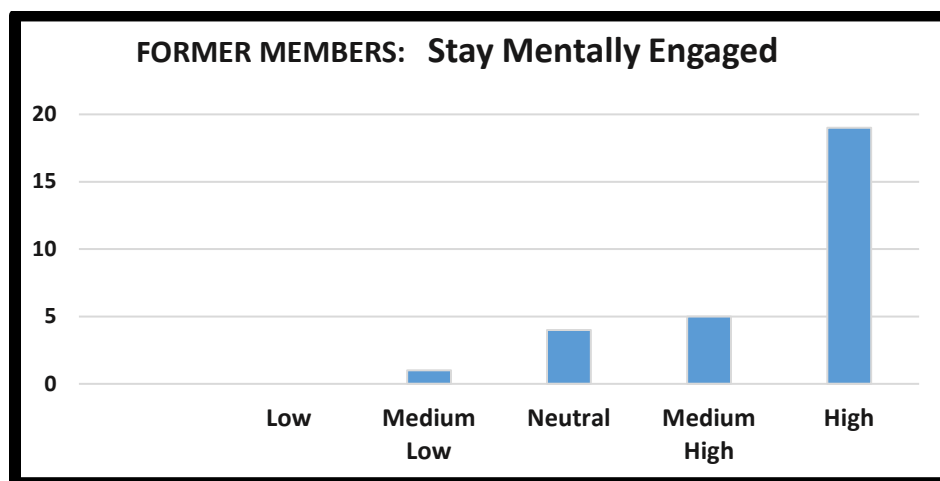




The top activities people engage in are seminars and workshops and the ratings of the attributes of 5CLIR indicate that 5CLIR members are getting what they want from their membership.

Surveys Sent to Former Members of 5CLIR

The number of responses to this survey was low. Of those who did respond, fifty-two percent had taken three or more seminars before leaving the organization and thirty-one percent had taken two seminars. Most, sixty-eight percent, had attended Encores and nearly half attended Great Decisions, other special programs, and interest groups. Fifty-one percent said they had attended the Preview. **Those who left 5CLIR were attracted to the organization for the same reasons as the current members. Staying mentally engaged and having meaningful discussions were important.**



Why did these respondents leave 5CLIR? Here are the full results of the survey:

FORMER MEMBERS ANSWER CHOICES	RESPONSES
Unhappy using Zoom	37.04% 10
Other activities consumed my time	33.33% 9
Insufficient seminars of interest	29.63% 8
Health issues	18.52% 5
Disappointing quality of the seminars and workshops	18.52% 5
Having to make a presentation was distressing	18.52% 5
Moved away from the area	14.81% 4
Financial burden	11.11% 3
Hoped to make more friends	11.11% 3
Insufficient opportunities to socialize	7.41% 2
Difficulty driving and parking	3.70% 1

What can be learned from the answers of these respondents? Many said they left because of health, leaving the area, or were too busy and these issues cannot be by the organization. **Those responses that included insufficient numbers of seminars and workshops of interest, the quality of presentations in the seminars, and distress over having to make a presentation are issues to be reviewed.**

Recommendations for Member Engagement and Satisfaction

The value and importance of things already being done to assure members' satisfaction should be continued. **The excellent work of the various committees of 5CLIR year-after-year continue to support the central features of 5CLIR programming: seminars, workshops, Encore presentations, special events and social events.**

Topics addressed by the seminars and workshops cannot be over-emphasized. The vast majority of members choose seminars because of the topic. They yearn to learn new things, stay mentally engaged, and have meaningful discussions. **Thus, it is clear to assure an engaged and satisfied membership we need to continue and even increase the efforts to make available a large number of engaging seminars and workshops. To achieve this goal, members should be asked each year whether or not there were topics they had wished been made available.**

These could include questions that might be asked of the members for specific requests as well as asking them to review a list of past seminars/workshops and topics that they would like to see offered again.

Encouraging members to become moderators is itself a needed step to assure a catalog with great offerings. The newsletter can be a vehicle for to promote volunteering as a moderator. A larger group of moderators means a greater variety of seminar and workshop topics. Notably over the years the Curriculum Committee has been organizing and hosting moderator forums which have led to new people serving as moderators and offering new topics. This effort can be improved by developing a moderator-mentor program largely relying on promoting co-moderating. An added benefit of co-moderators is having stability in course delivery when a moderator is otherwise unavailable to participate in a class or classes.

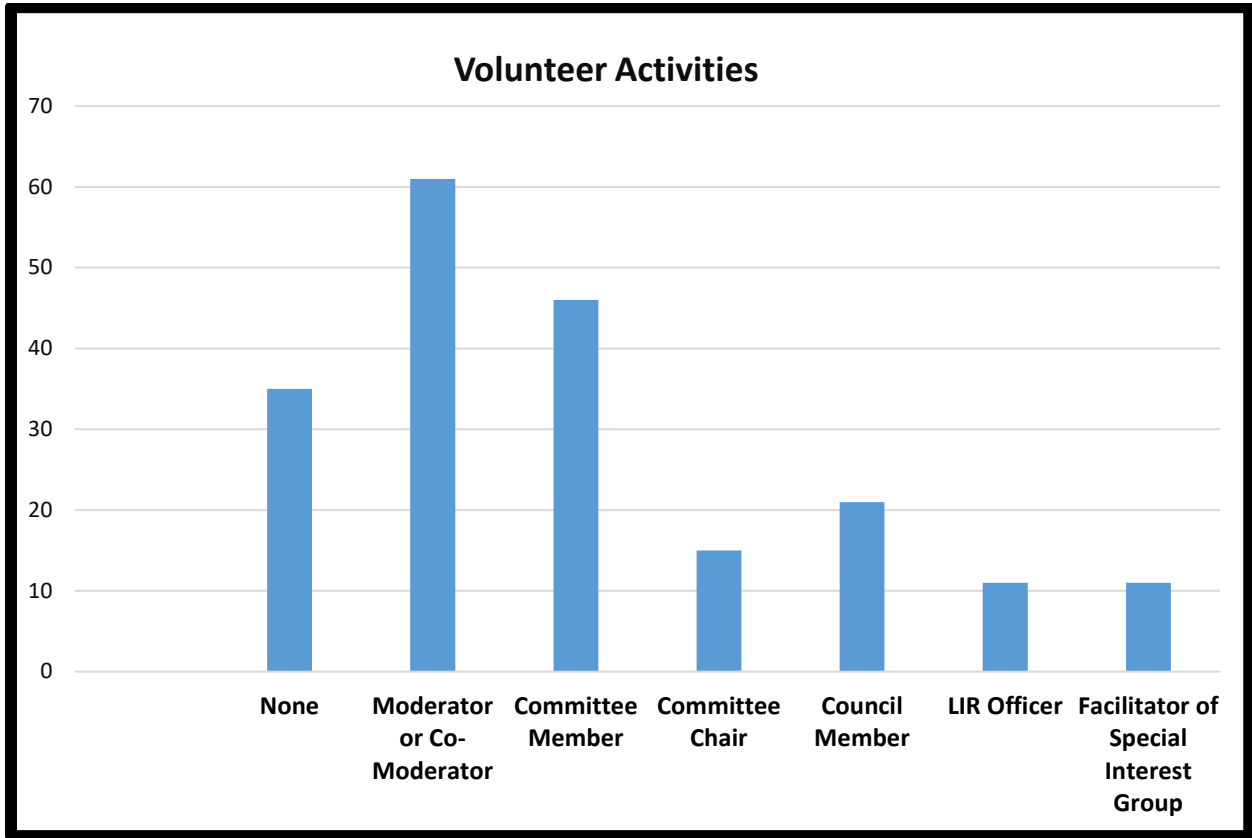
5CLIR members who are not themselves ready to take on the role of moderator could reach out to the entire membership suggesting topics they would appreciate seeing taken up in a seminar or workshop. The newsletter could be a vehicle for members to indicate interest in a particular topic for a seminar or a book for review in a group.

An important way to assure a continued flow of interesting topics is to assure the addition of more members to 5CLIR. Exciting peer-led programming requires a meaningful commitment to seeking a diverse and inclusive membership. The topic of marketing is recommended for review in Section Four. The ultimate goal is to maintain

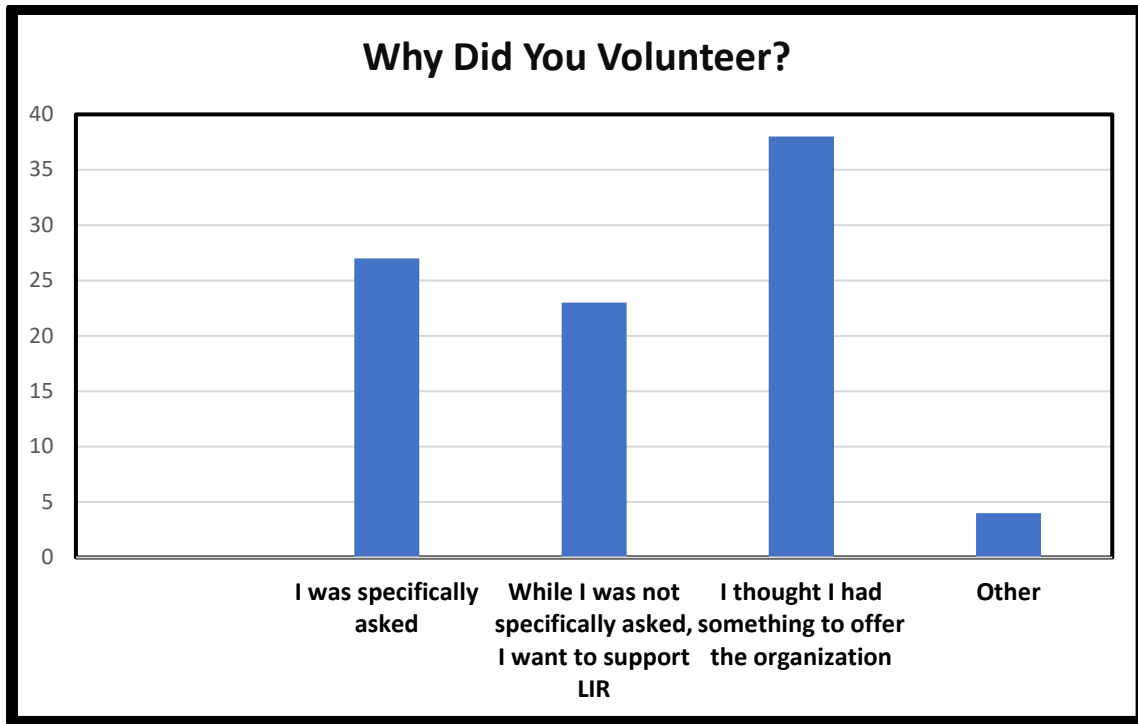
and feed our distinctive flavor of lifelong learning/peer-led learning. It engages the membership and draws the community together.

Section 3: Volunteering

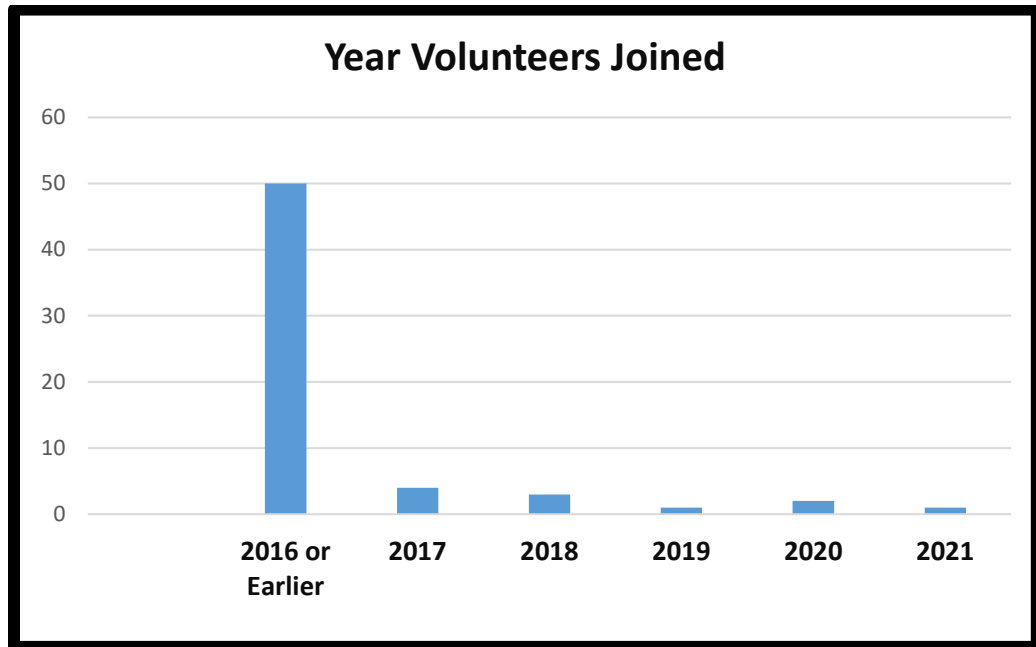
All existing 5CLIR members were asked, "During the past five years, in which volunteer activities have you participated?"



The most frequently checked option was serving as a course moderator or co-moderator. Of the 116 respondents, about fifty-six percent checked this option. In a separate survey sent only to 5CLIR members that had a record of volunteering, they were asked to identify the activities for which they had volunteered. **Ninety percent of the 61 people who answered the question said they had served as a moderator or a co-moderator.**

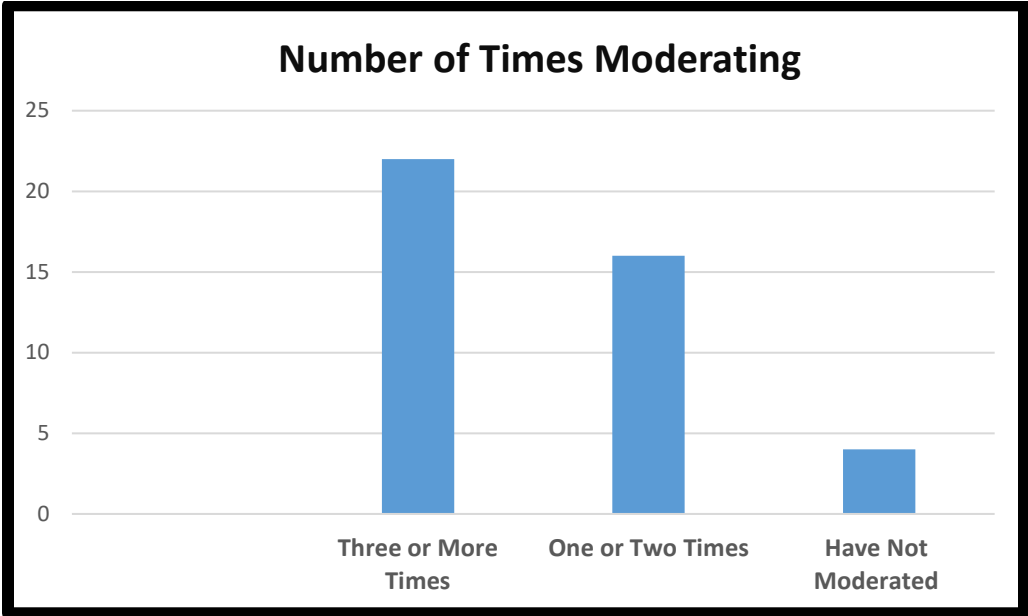


Over sixty-two percent of respondents said they thought they had something to offer 5CLIR; forty-four percent said they had been asked; and thirty-eight percent said they wanted to support 5CLIR.

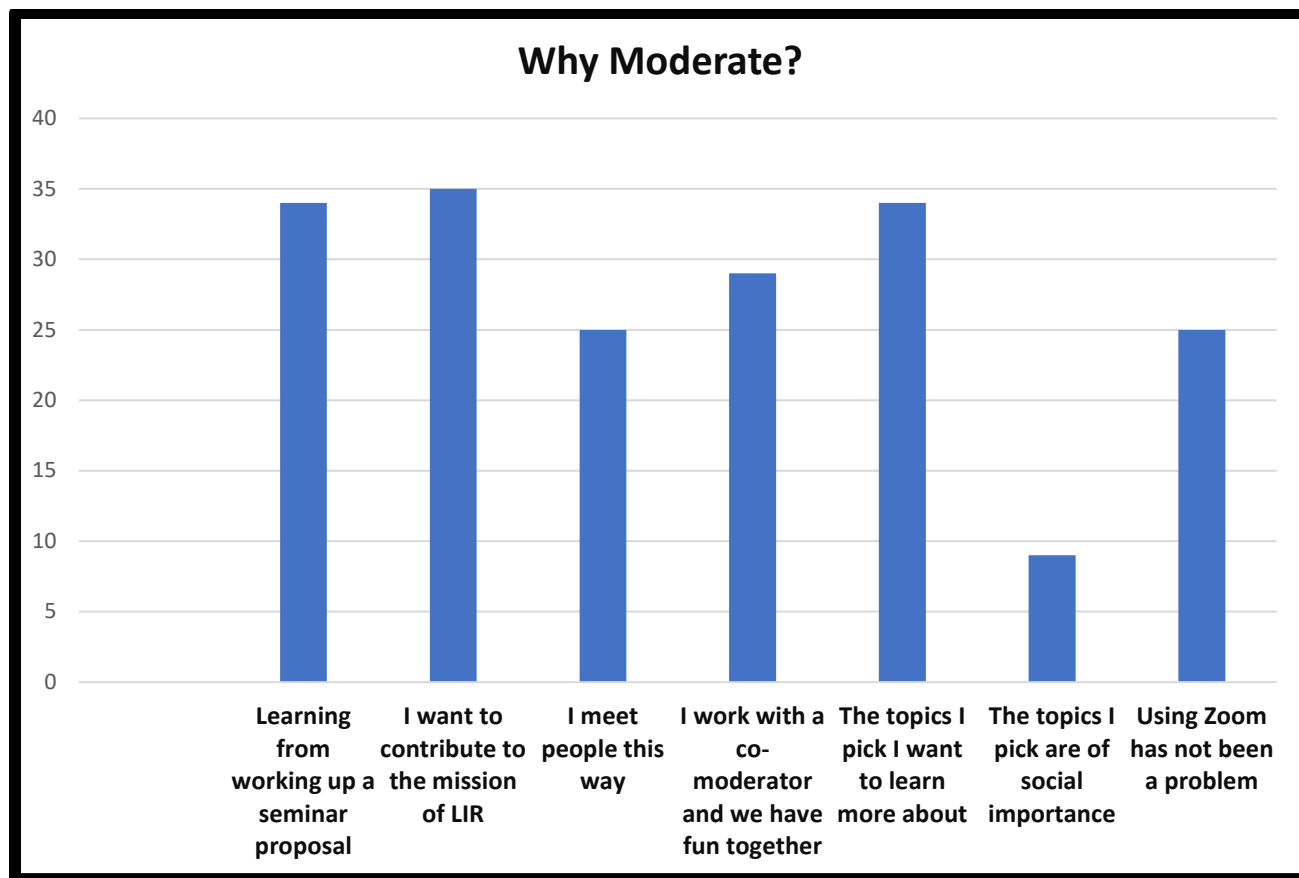


In the survey sent to identified volunteers, eighty-two percent said they had joined 5CLIR in 2016 or earlier. The indication is the longer one is a member of 5CLIR, the more likely one is to volunteer in some capacity. **This supports the idea that there may be a shortage of volunteers if membership levels are not sustained and newer members are not encouraged to step into volunteer positions in the organization.**

Moderating



Respondents were asked how frequently they had moderated in the past. Fifty-two percent said they had moderated three or more times. Thirty-eight percent said they had moderated one or two times.



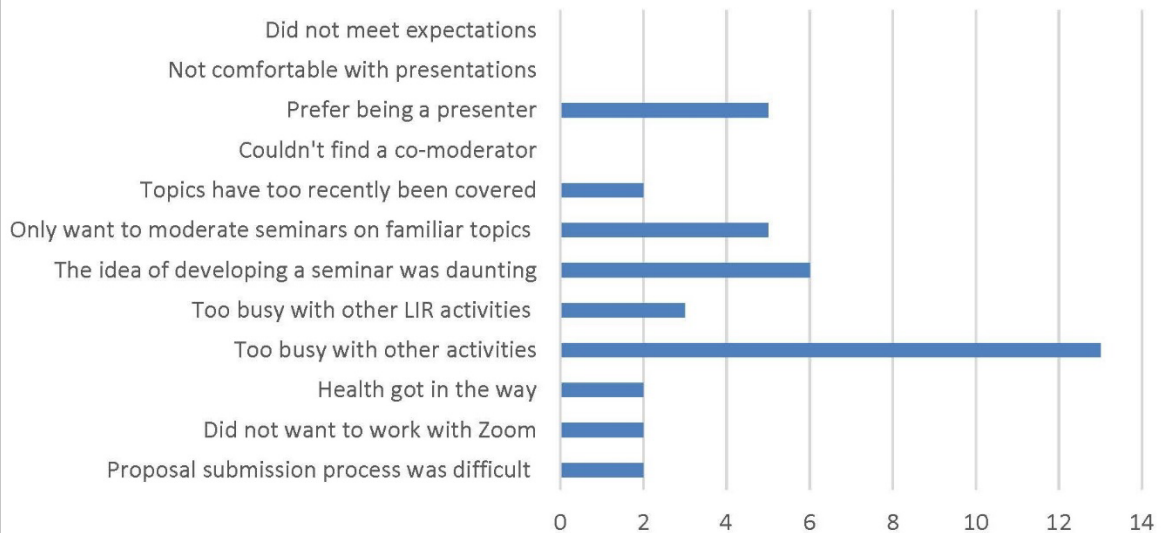
When asked why moderator's have chosen to do so, the most frequently checked reasons were:

- A desire to contribute to 5CLIR – seventy-one percent
- A desire to learn more about a topic – sixty-nine percent
- Fun working with a co-moderator – fifty-nine percent
- Meeting people – fifty-one percent

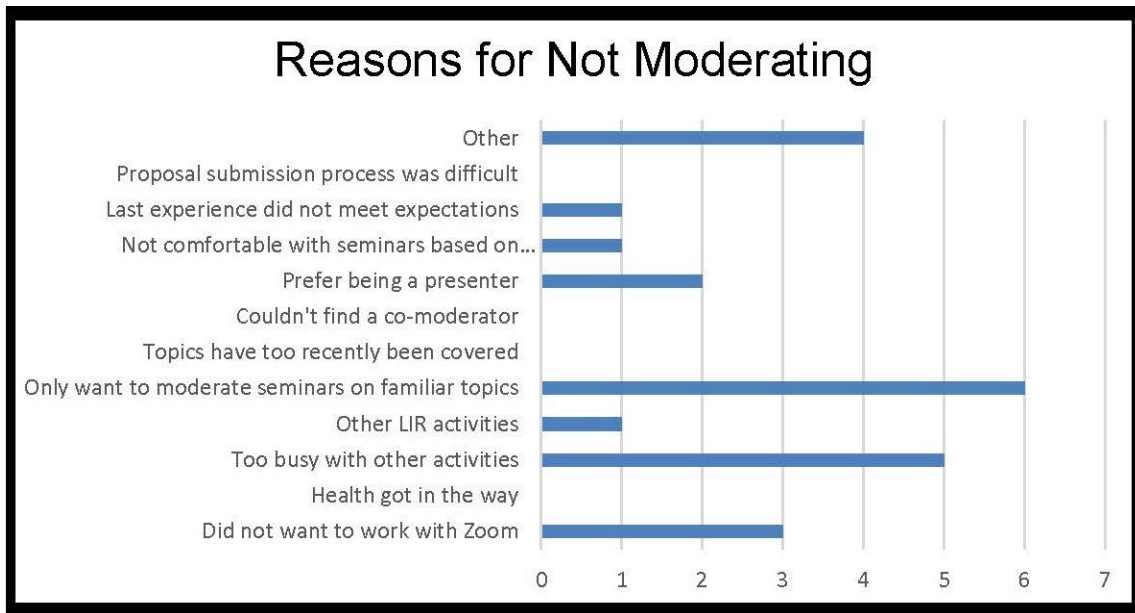
Fifty-one percent said that working with Zoom has not been a problem.

The comments added to this question included the following: wanting to learn what others have to say about a topic; desiring to share their knowledge; and missing their former role as a teacher.

If you have moderated in the past five years, why stop?



Members surveyed were asked to indicate reasons they have not continued to be moderators. In answer to this question, forty-six percent said they only wanted to moderate seminars on topics with which they are familiar. Thirty-eight percent said they were too busy with other activities and twenty-three percent or three people said they did not want to work with Zoom.



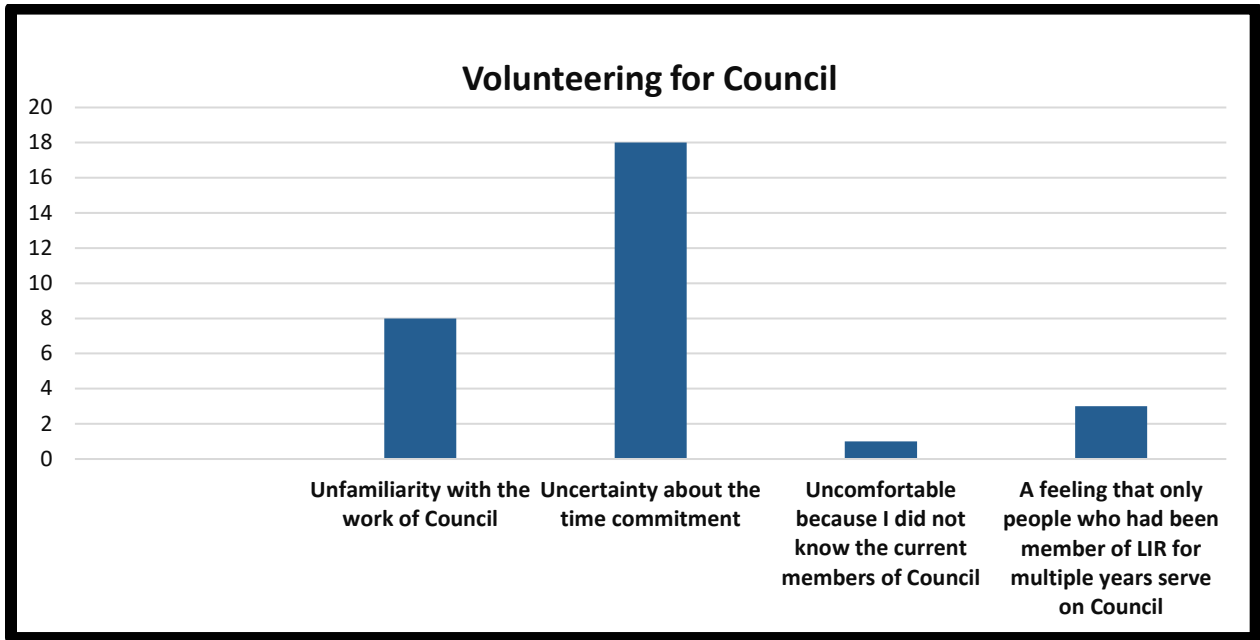
When asked why 5CLIR members have not served at all as a moderator, the most frequently was sixty-two percent stating it was because they were too busy. This was followed by those saying that the idea of developing a seminar was daunting, and those saying they preferred to be a presenter. The comments to the question indicated an interesting split between people who said they were too new to moderate and others who said they needed to step back.

Additional Volunteering

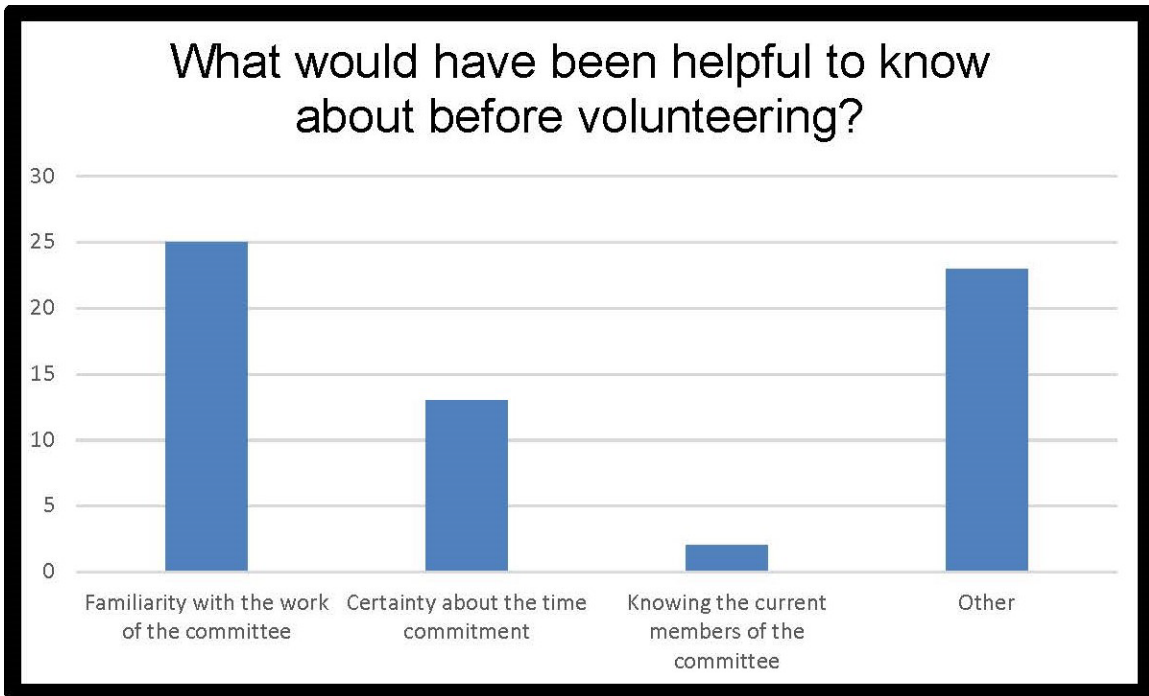
As noted in graphs found above labeled “Volunteer Activities” the members volunteered for more activities than moderating. There is a correlation between serving as a moderator and serving on a committee. People who serve on committees also serve as moderators. This is true whether one looks at the results of the Member survey or the results of the Volunteer survey.

Ninety percent said they had moderated and seventy-one percent indicated they had served on a committee with thirty-three percent serving as a committee chair. This group of active 5CLIR people also included thirty-six percent who said they had served on Council and twenty-five percent who served as an officer. Ten percent served in appointed positions and about twelve percent held other positions such as facilitating an interest group.

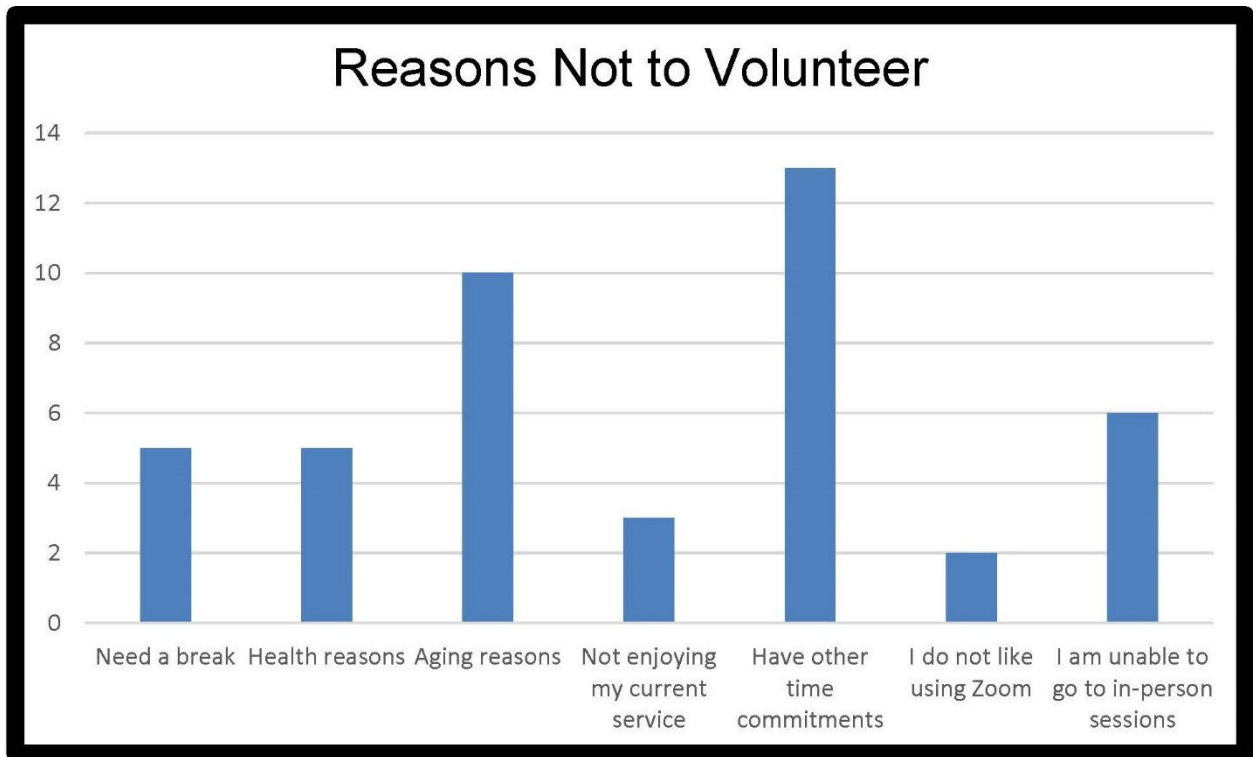
In the comments section, the respondents also noted they have volunteered by helping people with Zoom, by serving as an Encore facilitator, and writing news articles about 5CLIR. Other members have moderated and participated in Winter Intersession programs and served on the Finance Committee.



Turning to volunteering for Council, the question was “What was the biggest obstacle you had to face in deciding whether to allow your name to be put into nomination for Council?” Thirty-three percent noted uncertainty about the time commitment. In the comments made in response to this question, people noted they were busy, had served on Council, wanted a break, weren’t nominated, or had a desire to give other people a chance.



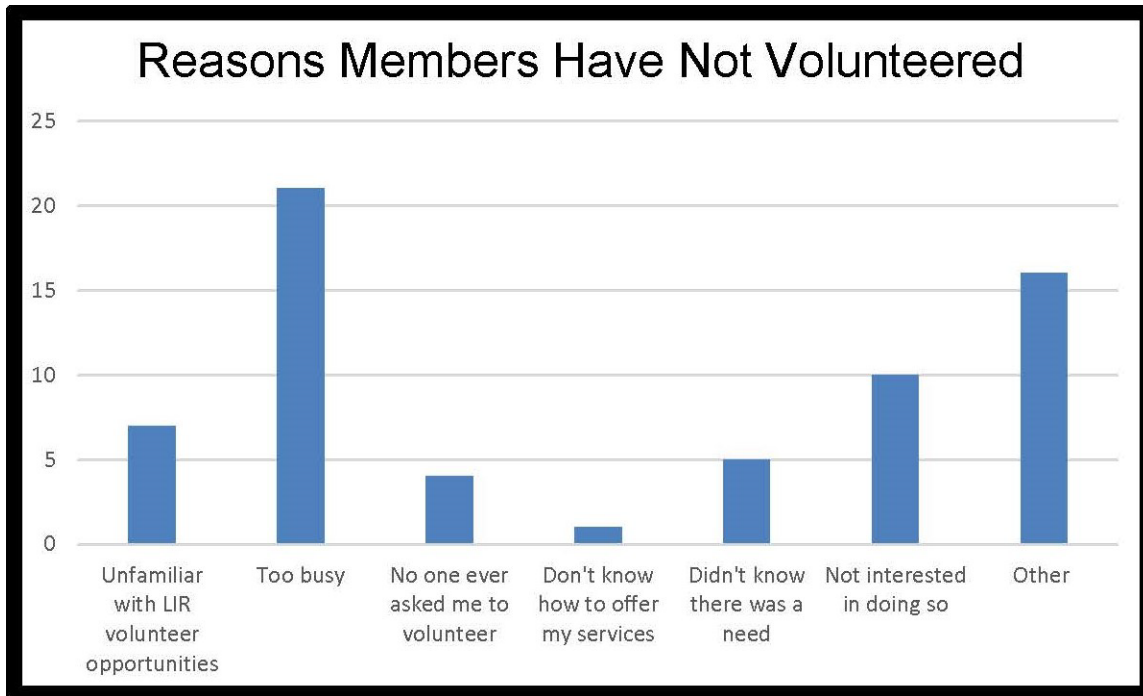
Respondents were asked, "What would you have liked to have known before volunteering?" Forty-six percent of the respondents would have liked to have had more information about the work of the committee and twenty-four percent noted uncertainty about the time commitment.



If we do nothing in order to promote volunteering, what are the prospects for volunteering in the future?

Most current volunteers joined 5CLIR in 2016 or earlier. They often have volunteered for multiple years and are likely to be older members. Further insight is supported by the answer to one question. In the Volunteer survey eighty percent of respondents said they did anticipate future involvement with 5CLIR as a volunteer, *circumstances permitting*. This indicates that twenty percent of current volunteers are predicting they will not be volunteering.

The existing volunteers may not continue to volunteer in the next year or two for several main reasons: other time commitments represented by thirty percent of responses and aging listed by twenty-three percent of responses. Fourteen percent said they are unable to go to in-person meetings.



Thirty-two percent of the members surveyed stated they have not volunteered in any capacity.

When asked why they had not volunteered, close to forty-four percent said they were too busy. Slightly over twenty-one percent said they were not interested in doing so. **A total of twenty percent indicated they had either not been asked to volunteer, they did not know there was a need or that they did not know how to offer their services. This group could be encouraged to volunteer with some effort.**

Members were asked if continuing to use Zoom for committee and other volunteer work would encourage them to consider volunteering. Sixty-eight percent of the surveyed volunteers answered “yes.” The chances of getting more volunteers for committees is improved if the committees make use of Zoom.

It is also noteworthy that eighty-six percent of the current volunteers said they had encouraged other people to volunteer and were successful. As the responses indicate, volunteering to moderate is by far the most popular volunteering activity. Thus, the need to focus on getting volunteers to serve on committees, Council, and officer positions.

Recommendations for Volunteers

What Does the Information Tell Us We Might Do to Promote Volunteering?

- As noted above, people volunteer because they have been personally asked to do so
- Members need to understand and be familiar with the work of the committees
- A clear indication of the time commitment is important
- While moderating is the most popular way to volunteer, the message needs to be communicated that 5CLIR has a need for other forms of volunteering
- Zooming should continue to be used, especially for committee work
- As the pandemic ebbs, members who want to moderate can return to in-person seminars
- Assist in developing a seminar as an easier process.
- Encouraging people to have a co-moderator and helping them find one is one option
- Publicly acknowledging volunteers to send a message to those who have not yet volunteered
- Promoting volunteer needs among newer members

Every aspect of 5CLIR offerings requires volunteers. Multiple factors affect the number of volunteers ready to step into a variety of roles.

First, it is recommended that Council look at expanding the list of the volunteers who would be awarded a “privilege” regarding a seminar of their choice. Currently, only moderators receive such a privilege, but Council could look at the question of extending this privilege to people who serve as committee chairs and/or arrange an excursion or

trip for 5CLIR members. Perhaps serving on Council for three years might result in a privilege for a designated time period.

Getting 5CLIR members to be willing to have their name put in nomination for election to Council requires attention. **One step is to be sure efforts are made regularly to inform members about Council and its authority and responsibilities under the by-laws.** This would include the frequency of Council meetings and the types of work individual Council members might be asked to undertake. **Moderators need to understand that one of their important responsibilities is to try to get a member of their seminar to stand for election to Council.** To this end Council itself needs to be sure that moderators understand Council and are supplied with printed materials they can distribute to their seminar members.

It is important that there is complete clarity regarding what the 5CLIR committees are, their individual portfolios, the required number of chairs for each committee, the size of the committee, the length of term when serving on a committee, a committee yearly calendar of activities, and information regarding the frequency of meetings and the use of Zoom.

It is recommended that each Committee make suggestions regarding these matters and share them with the Vice President and Council.

The By-laws provide that the Vice President is “an ex-officio member, without vote, of all other committees. He or she oversees the effective functioning and operation of all committees.” **It is suggested that Council consider the question of how it might play a role along with the Vice President in assuring the effective functioning of the committees.** This could perhaps include a Council member who serves as a liaison to the committee and reports to the Vice President. Council members could take a more active role in finding and recruiting people to volunteer for the committees. Council might consider creating a subcommittee concerned with the recruiting of volunteers.

All in-person social events, including the Preview, should have a table at which 5CLIR members can obtain information about the committees and have the opportunity to request additional information or even volunteer for a committee.

Finally, there are various things the Outreach Committee has done, which can be included on its yearly calendar of events:

- Continue the practice of placing in the June Newsletter the names of all volunteers of the past year to acknowledge their important contributions to 5CLIR

- Having the Newsletter include an article or feature that touches on volunteering in some way
- Including a process by which the Vice President would inform the editor of the Newsletter of openings on a committee and the Newsletter reports that opening and invite people to volunteer
- Including in welcoming conversations with new members, various ways the member could contribute to 5CLIR by volunteering
- If a specific task, for example distributing brochures, needs volunteers, advertising it in the Newsletter with a request for a volunteer.

Section 3: Marketing

Our organization has been in a steady state in that total membership has held up reasonably well at or near 240 in most years. Financially, 5CLIR has also remained stable over the past years despite a lowering of dues at the start of the pandemic. However, there are indications that there may have to be an increase in dues in the next year or two as expenses rise.

Given this overall picture of stability, why be concerned about marketing? There are several reasons. As noted in Section One, 5CLIR members have aged with thirty-eight percent of the current membership is between the ages of 80 and 89 and forty-three percent are between the ages of 70 and 79. **The drop of the percent of members from decade to decade indicates that as our members age, they leave 5CLIR. Attention needs to be paid to recruiting new younger, dues-paying members.**

An older membership means a reduction in the number of people who are willing and able to volunteer to be moderators, committee and council members, and officers. Thus, a large enough membership is needed to serve as a pool from which to recruit volunteers. When there is a sufficiently large body of potential volunteers, there will more likely be members to replace volunteers who need to step down.

A greater diversity of members could mean a larger pool of potential moderators. Increased diversity has significant benefits. It means a greater chance of new and interesting ideas for seminars being proposed. With greater diversity, seminar presentations and discussions benefit. In addition, it is interesting for members to be able to meet people with backgrounds and experiences different from their own.

What should our marketing message be?

We asked the membership questions designed to help sharpen, focus, and refine our marketing message. The following list is a useful starting point for crafting a marketing message:

- The basic mission of 5CLIR
- The rich range of 5CLIR's offerings
- Information about our public programming including Encore presentations and Great Decisions
- The diversity of the membership
- Contact information
- The 5CLIR webpage URL
- Information about dues and dues assistance

As reported earlier, 5CLIR's membership makes the most the use of seminars, workshops, Encore, Great Decisions, and related offerings. **This strongly suggests that our marketing focus should be – as emphasized in our mission statement – learning.** Our marketing message should emphasize "self-learning," that is, all members of a seminar do participate that can include presenting on a topic or leading a discussion. The Preview should feature that same spirit.

Recommendations for Marketing

The size and nature of our membership is fundamental in terms both of the kind and quality of programs and events that are offered, and in assuring a sufficient number of volunteers to maintain and support the offerings. The current membership seems to stay in approximately the 250 range, a size adequate to meet the financial and volunteering needs. There would be benefits of having it grow by ten percent or more. An increase of 25 or more members would help secure the financing and place less pressure on the need to raise dues in the future. It would help increase the chances that the programming would be invigorated with new ideas and energy.

As written above, exciting peer-led programming requires a meaningful commitment to seeking a diverse and inclusive membership.

A larger membership would increase the probability of always having a sufficient number of volunteers to serve as moderators, members of Council, committee chairs and members, and officers. This point is underscored by the fact that the current membership is aging and as people age, naturally enough, they are likely to step back from volunteering.

The first recommendation to Council is to seriously and with deliberation revisit the question of renaming 5CLIR. While there should continue in some way to include a reference to Five Colleges in the name, it could be something that at the same time gives a greater opportunity to seek a diverse and inclusive membership. If determined to be done, Council would need to additionally develop a process for doing so.

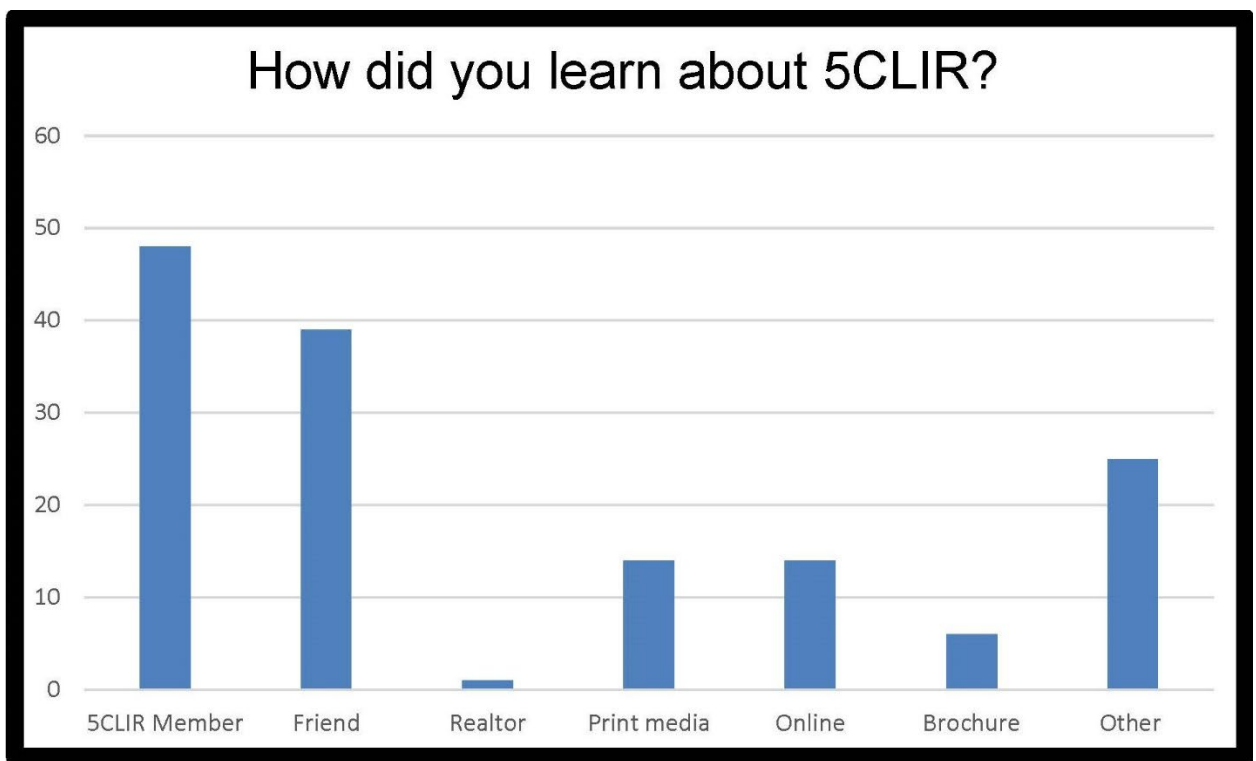
Going beyond a recommendation for a name change, the following ways might further enhance the already significant work of the Outreach Committee:

- Establish a formal process for looking at the website with a view toward making it an improved marketing tool as well as making it more user-friendly for current 5CLIR members
- Re-establish the 5CLIR speaker's bureau which makes available people who would attend the meetings of local organizations to inform them about 5CLIR
- Make available each year a group of Encore presenters that would be willing to be part of a series sponsored by a local library

- Advertise on New England Public Media
- Ask 5CLIR members to send to the Outreach Committee the names and contact information of publications in which to advertise
- Ask local libraries to list 5CLIR on their websites

The Outreach Committee has contributed greatly to the promotion of 5CLIR through such tasks as the distribution of brochures. Recognition is also given to the power of the Previews, Encore, and special programs in attracting new members to 5CLIR.

In our recent questionnaire, we asked members how they learned about 5CLIR.



The most significant way members learned about 5CLIR was by word of mouth from a 5CLIR member or a friend – forty-two and thirty-four percent respectively. Print media and online were next in importance. The online response could include finding out about 5CLIR by looking at the webpage or by joining an online Zoom-based public presentation.

This data suggests that the best way to promote 5CLIR is by having members inform their family and friends about 5CLIR. This also suggests marketing will be enhanced by a larger membership.