



Osher Lifelong Learning Institute at Boise State University

STRATEGIC PLAN 2025 - 2029

MISSION STATEMENT

The Osher Lifelong Learning Institute at Boise State University provides a wide range of college-level, non-credit lectures, short courses, and excursions for the intellectual and social cultivation of its members.

VISION STATEMENT

The vision of the Osher Lifelong Learning Institute is to be the finest academic program designed for people over age 50, providing intellectually distinguished non-credit courses and learning opportunities in optimal educational settings, and delivering meaningful opportunities for social engagement. The Institute is supported and sustained by Boise State University, an engaged membership, the Bernard Osher Foundation endowment funding, and contributions from members and community supporters.

INTRODUCTION

The Strategic Plan includes reference to member surveys conducted in partnership with the National Resource Center for Osher Institutes in 2014, 2016, 2018, 2020, and most recently, 2022. The 2022 survey was conducted through October 2022 with results made available to the Institute in December 2022. These surveys provide demographic information, measurement of program success, and identification of strengths of the Osher Institute. Results from previous surveys to the most recent survey provide reflection and measurement of growth, improvement

in programming, strengths of the Institute, and recommendations from actual Osher Institute members who advise leadership for future development of the Institute. Results from the most recent survey in 2022 were informative to this updated Strategic Plan and provide valuable new information stemming from recovery of the pandemic to inform and support this plan.

Since inception up to Fall 2020, the Osher Institute gained significant membership annually as the program became more visible to the community; as new retirees with the time to enjoy the Institute's offerings discovered the many benefits of Osher membership; as the Institute's current members recruited others to join; and as new residents moved to Boise and made it a priority to join the local Institute.

In March 2020, the Osher Institute closed its doors for the remainder of the semester as a global pandemic occurred. By fall 2020, new programming was provided via livestream access for members, but the Institute experienced a significant reduction in membership. As recovery began and continues, membership is on a positive trajectory once again. Significant effort has been made to continuously address issues previously identified, but several remain critical challenges, as outlined in this Strategic Plan.

The Osher Institute at Boise State became an official endowment-funded Osher Institute in 2006. From 2014 to 2024, the number of programs per membership year grew from 83 to 155. The Institute currently has 1,555 members participating in educational programs. As many as 12 Special Interest Groups (SIGs) were offered in 2024, with more than 200 Osher members participating. The quality and rigor of programming remains consistently high, as evidenced by evaluations by Osher members.

Evaluations measure members' satisfaction regarding content matter, delivery of content, pace of delivery, preparation, and overall organization of presenters. Speakers also receive an evaluation form to comment on the quality of support received from staff as well as their overall experience in presenting to an Osher audience.

The Osher Institute is financially sound, with more than \$2M in endowment funds procured from the Bernard Osher Foundation in 2006 and again in 2011. The endowment provides an annual distribution of funds accessible to the Osher Institute's use throughout the year. Secondary funding for the operating budget stems from Osher members for membership and course fees. Additionally, members support the Institute with donations to the Osher Excellence Fund, created by Osher members in 2011 for the purpose of providing financial funds for present and future program needs. In FY22, 24.7% of members supported the Osher Institute with personal contributions, and four community sponsors provided funding support. Community partners Zero Six Coffee Fix and City Club of Boise supported the Osher Institute with promotional opportunities and discounts. In FY23, member support of the Osher Excellence Fund grew to record high of 37.8%, following a planned campaign to increase funds that included a legacy gift of \$50,000 provided by a longtime Osher member who passed away in June 2022.

Of the 75 to 85 speakers hosted each semester by Osher, approximately 20% are Boise State University faculty or staff who contribute time and effort to provide high-quality, college-level

courses, lectures, and seminars. Other speakers featured are historians, authors, scientists, politicians, healthcare providers, environmentalists, and more from local, regional, and state organizations. In recent years, hosting speakers via livestream has expanded the pool of potential speakers to support a growing membership with varied interests.

Boise State University provides in-kind support to the Institute, including classroom and office spaces, social areas, and ancillary services. During the past five-year Strategic Plan cycle, a portion of the Director's salary, which had been provided by the Extended Studies Division at the University, was moved to the Osher local/self-sustaining budget, which now covers 100% of that expense as well as salaries and fringe benefits for all Institute staff. The Institute purchases computers, software, and licenses for programming, while the University provides technical support when requested. The University also provides other ancillary services for an annual fee of \$35,000 paid to the Extended Studies Division.

Members' needs for educational engagement are being met, and members appreciate the significant improvements in classroom and technology, again evidenced by individual course evaluations, program surveys, and the most recent National Resource Center survey results in 2022. Thanks to the growing population of retirees in the Boise region, word-of-mouth testimonials by satisfied members, and University sponsored promotions, the membership growth of the Osher Institute continues to exceed expectations. With demand for additional educational and social options, new opportunities and challenges have been identified that will require strategic attention to ensure the continued excellence of the Osher Lifelong Learning Institute at Boise State University.

SUMMARY

In 2024, the Director and Advisory Council Chair led the process for a review and update of the Strategic Plan for 2024-2029. An ad hoc strategic planning committee was formed, and three experts from within the membership and another from Boise State University who is also an Osher member were recruited. All reviewed the past Strategic Plan, examined the most recent NRC Survey of 2022, and made suggestions for updates and new focus on priorities.

In October 2022, the National Resource Center (NRC) of the Osher Lifelong Learning Institutes at Northwestern University School of Professional Studies conducted an Osher Lifelong Learning Institute Membership Survey, with 453 members out of approximately 1,100 total members (41%) responding.

The Osher Institute's current average member age is 65-79 years old. The ratio of males to females is 30% to 70%, whereas in previous surveys, the ratio was 27.75% to 72.25%. The 2022 survey by the NRC reflected that more than 90% of members held a Bachelor's, Master's, Doctoral degree or hold professional licenses (medical, law, etc.)

According to the 2022 survey, reasons for memberships and involvement in the Osher Institute continue to reflect a desire to be intellectually stimulated by educational programs, to enrich one's life, to meet new people, and to connect with Boise State University.

The recent survey also revealed strong positive feedback on perceived performances by the

Osher Institute staff and programming: quality and diversity of educational programming, membership involvement, receiving useful information from staff and the website, a user-friendly registration system, staff ability to make members feel welcome and appreciated, and opportunities to evaluate quality of courses.

Since 2023, annual reports reveal consistent growth in membership, numbers of courses/presentations offered and faculty/industry expert presenters, enrollment and headcount, and member involvement in volunteer efforts. Current financial reports document financial growth for the Osher Institute by means of fundraising programs, member and community support donations, membership dues, and course fees. Currently, the operational expenses of the Institute are funded by a combination of resources: course fee and membership revenue, endowment distribution funds, and Excellence Fund (spendable) support. All of these accounts are owned by the Osher Institute and receive traditional University oversight with the Director and Dean as first budget managers and then University management of endowments and investments.

Since the pandemic in 2020, operational funds created by course fees and membership dues have not been sufficient to support the Institute, and funds have been drawn from reserves. Current challenges include finding new revenue sources to fill gaps from losses that have not recovered following the pandemic. These will require attention to ensure the continued excellence of the Osher Lifelong Learning Institute at Boise State University.

In keeping with the standards of the original plan, this updated Strategic Plan is intentionally simple and concise, does not seek to redefine our mission or vision statements, and addresses the ongoing critical issues identified in past plans. As agreed upon by the Council, Director, and review committee, this Strategic Plan is a tune-up, rather than a major overhaul of the 2019-2024 plan. That plan was significant in steering the Osher Institute through a pandemic, with prior extreme growth and then significantly reduced membership. By following the previous plan, priorities were on point with development of online or livestream programs and other initiatives to continue as a self-sustaining Institute.

CRITICAL ISSUES/AREAS

To develop the new Strategic Plan, a basic S.W.O.T. analysis of **S**trengths, **W**eaknesses, **O**pportunities, and **T**hreats was developed, using standard methods such as internal department reports, financial statements, stakeholder focus groups, and member surveys.

For the benefit of its members and Boise State University, the following are the five critical areas on which the Osher Institute remains focused to ensure the sustainability and prosperity of the Osher Lifelong Learning Institute: 1) Curriculum 2) Fundraising 3) Membership 4) Infrastructure 5) Technology. The following discussion outlines the Goals, Strategies, Management, and Performance Metrics for each Critical Issue/Area.

1. Curriculum – Providing for the “intellectual cultivation” of our members is the cornerstone of the Osher Institute’s mission. High quality programming offered by skilled and knowledgeable presenters is the backbone of success for the Institute.

Goals

- Continue to increase the variety of presentations to keep pace with growth and member needs and interests.
- Continue to expand the pool of highly qualified, professional presenters while maintaining a high standard of excellence.
- Continue to expand the technology to improve livestream presentations and recording of same as well as improve the member experience with high-quality presentations.
- Expand technology to include the ability to record and archive professionally developed in-person lectures and courses. See Technology.

Strategies

- a. Maintain and expand outreach efforts within the community/region and area colleges and universities to cultivate new presenters and new collaborations.
- b. Seek nationally recognized speakers including authors, industry experts, faculty from other universities, and others for high-level lectures and courses.
- c. Continue to use volunteer-staffed committees to solicit member suggestions for subjects and nurture talent within the membership.
- d. Continue to steward existing presenter relationships to ensure ongoing retention.
- e. Continue to seek recommendations for new presenters from existing instructors.
- f. Continue to invite potential presenters to attend a lecture or course session as a guest to witness the Osher teaching experience and gauge audience involvement in presentations.
- g. Employ presenter testimonials to encourage new faculty and new proposal topics.
- h. Continue to rally Osher members to network within their social and community circles and engage in discovery of possible presenters and topics.
- i. Explore additional ways to solicit membership ideas and feedback.
- j. Expand use of and collaboration with NRC resources and other Osher Institutes.
- k. Collaborate with organizations that are in accordance with the mission of the Osher Institute.
- l. Evaluate travel programs, including a review of current travel vendors (Collette Travel, Travel Fever, Road Scholar) as compared to other travel vendor opportunities. This program provides added revenue to the operational funds of Osher, travel and educational opportunities to Osher members, and a fuller breadth of topics of lectures, short courses and workshops to the general membership.
As part of this, the reinstated committee and Osher Institute will:
 - i. Review fiscal impact/benefits/return on investment.
 - ii. Review member participation and fulfillment of expectations.
 - iii. Consider staff time to plan, coordinate, and support the travel program.

Management

Committees, Assistant Director, and Director

Performance Metric

Gauge growth/development 2025-2029:

- a. Number of presenters and evaluation of performance,
- b. Number of programs and evaluation of programs,
- c. Number of travel programs and evaluation of attendees,
- d. Assess ROI of travel regarding revenue and member satisfaction.

2. Fundraising – Fiscal strength and stability is necessary for the Osher Institute to continue to thrive as a fully self-sustaining program; seek creative ways to engage with members to increase commitment and investment in the Institute; and meet expectations of the Osher Foundation.

Goals

- Continue to bolster the Osher Excellence Fund. At the end of five years, 50% of Osher members contribute to the fund with a goal of \$75,000 annually.
- Promote opportunities to members to create at least five legacy gifts to support the Osher Excellence Fund and future sustainability.
- Create additional corporate philanthropic partnerships with a minimum annual goal of \$20,000 by the end of fiscal year 2029.
- Examine additional means of creating new revenue sources such as special events, regional travel and field trips, hosting resource fairs for seniors, etc.
- Create a celebration of the 25th Anniversary of the Osher Institute in 2027 and use this milestone for university and community recognition, special programming, and special fundraising opportunities.

Strategies

- a. Identify fundraising plans to increase the percentage of members who contribute to the Osher Excellence Fund.
- b. Share information on purpose of the Osher Excellence Fund and specific program support based on the amount of contributions to the Fund.
- c. Collaborate with Boise State University Foundation to increase annual participation and identify, solicit, and steward major donors and planned gift donors.
- d. Continue to manage Institute resources and regularly analyze revenue and expense data to identify threats and opportunities; analyze need for staff salary/fringe benefits support; manage growth of speaker honoraria; and review efficacy of Osher Faculty Grants and other expenditures throughout each fiscal year.
- e. Develop additional streams of revenue to support annual operating funds. This could include hosting an annual Senior Resource Fair, hosting special speakers, and creating events that serve as fundraisers for Osher.
- f. Plan and include annual events to highlight donors and sponsors.

Management

Fundraising Committee, Director, Boise State University Foundation Directors, and Dean of Extended Studies

Performance Metric

- a. Track funding reports to determine outcomes of efforts to increase awareness and contributions to the Osher Excellence Fund.
- b. Measure ROI of special events and programs targeted to increase revenue.
- c. Assess progress of annual financial outcomes of Excellence Fund goals, number of donors, and/or size of annual gifts.
- d. Develop new corporate sponsorships and community partnerships in support of the Excellence Fund.
- e. Assess expenditures for future needs and growth of the Institute.

3. Membership

By the end of June 2020, the Osher Institute had 2,008 members, but the impact of the pandemic caused membership to decline to 1,204 by the end of 2022. Since then, membership numbers have increased and reached 1,555 at the end of fiscal year 2024, still significantly below pre-pandemic levels.

Osher membership, locally and nationally, is aging. The 2022 Osher survey conducted by the Osher Institute National Research Center (NRC) revealed that 73.3% of Osher members were over the age of 70. Only 7.6% were under 65. As the Osher mission is to offer programs designed for adults 50 and over, the Institute is challenged to attract, retain, and engage members who are a younger generation than the current average member.

Diversity of membership is another growth opportunity. The 2022 NRC survey showed that 96% of members in Idaho identified as white. This is comparable to national surveys of other Osher Institutes and reflects the state of Idaho's demographics. However, the Osher Institute should strive to break barriers of Idaho residents to include more members of other ethnic and racial backgrounds. Finally, the SWOT analysis has identified opportunities to grow membership and expand delivery of Osher programs to other locations in the state of Idaho.

The Osher Lifelong Learning Institute has identified and is growing more opportunities to provide social cultivation and community building. Previous NRC surveys indicated that while social engagement is not the identified priority for the majority of members, a large number of respondents commented on the value of interaction and engagement with others while taking part in classes, as well as other social activities including Special Interest Groups (SIGs), documentary film events selected for potential conversational content followed by discussion, and special events, all created and developed with the purpose of connecting members socially and providing a sense of community engagement.

Goals

- o Increase membership to 2,700 by the end of 2029, with 10% under the age

of 65.

- Within the next five years, reflect the ethnic/racial diversity of the greater Boise metropolitan area, considering that Osher programs are developed for adults aged 50 and over. (The average age range currently is 65-79, and 90% hold college degrees.)
- Continue to expand opportunities for members to connect and engage with each other through workshops, events, and other activities.
- Evaluate SIGS at the end of each year to determine efficacy and member response. Encourage Osher members to consider facilitation of SIGs, operated as originally designed, as outside of regular Osher programs as a supplemental way for members to engage in non-Osher settings.
- Maintain and continue to develop volunteer opportunities for members.
- Explore ideas and develop a plan to make Osher more accessible in additional Idaho locations.

Strategies

- a. Offer a one-year marketing plan, based on the five-year strategic plan goals and strategies. Evaluate the plan in May each fiscal year for review of return of investments, outcomes, and strategies. After review, establish a new plan for the subsequent fiscal year.
- b. Gather and analyze existing demographic data from state/county/city sources to understand ethnic/racial diversity and educational levels of the population in the Boise metropolitan area (i.e., Boise, Meridian, Eagle, Garden City, Nampa, Caldwell).
- c. Explore and implement possible ways to appeal to prospective members between the ages of 50-65 and likely to still be in the workforce without changing the dynamic of programming intentionally designed for adults aged 50 and over.
- d. Continue to identify programs to offer on occasional evenings and weekends to appeal to prospective members who are not available during the business work week.
- e. Continue to extend invitations to social events available to the public with opportunities to attend and learn more about Osher programs.
- f. Consider a variety of membership opportunities (e.g., “livestream only” or Saturday series).
- g. Identify ways to connect with and attract retirees from major employers and state agencies, including offering one-year free membership to people as they retire from select partners.
- h. Continue to host regular Volunteer Information and Orientation sessions that identify ways that members can engage, including volunteering as committee members, facilitate a SIG, or serve in other capacities.
- i. To keep members engaged with the Institute and others during the summer, include opportunities such as semester sneak previews, lecture series, travel and learn programs, and social events open to the public to generate interest.
- j. Create and implement an annual Marketing Plan to identify key areas of promotional activities to increase membership in Osher.

- k. Explore opportunities for partnerships with other organizations which provide mutual benefit in increasing membership.

Performance Metric

- a. Establish at least five key marketing strategies annually. Evaluate effectiveness of each strategy by membership headcount, how they learned of the Institute and a comparison of cost of strategies to membership count, donations and investments to Osher.
- b. Hold annual volunteers-and-staff committee meeting to discuss and measure ROI of each marketing initiative regarding membership growth, details on efforts (e.g., magazine or newspaper advertisement; posters; radio station advertising, underwriting, and speaker interviews), and other targeted strategies.
- c. Host at least two volunteer information/orientation sessions per semester to include new members or others interested in supporting the Institute; measure headcount of attendees and follow up with dates/times for volunteering.
- d. Membership data (overall growth, growth in specific age groups, diversity)
- e. Continue to evaluate all social-related programs including SIGs, discussion groups, volunteer programs, committee engagement for satisfaction and feedback.
- f. Continue annual review of data on volunteers, including returning and new volunteers.
- g. Measure attendance and satisfaction of members attending special programs developed specifically for evening, Saturday, or special dates.

Management

Marketing/Membership Committee, Volunteer Committee, Staff, and Director

4. Infrastructure – The Institute has experienced sporadic growth since 2020 following the pandemic. In 2024, membership began to recover with a return of members from 2020 and the addition of new members. To ensure sustainability, there is a need to maintain adequate staffing, create additional learning opportunities, and increase space availability.

Goals

- Ensure ongoing staffing levels to support the growth of the Institute.
- Provide professional development and career growth opportunities to staff for retention.
- Replace classroom furniture in Rooms 207 and 510 with funds donated by members through the Osher Excellence Fund.
- Identify locations and delivery times for expanding and developing additional sites to host Osher programs, support SIGs, and offer other educational events.
- Maintain documentation on policies and procedures to promote effective workplace operations.

Strategies

- a. Ongoing review of staff roles and responsibilities to reflect increased workload.
- b. Continue to explore career development and educational opportunities.
- c. Continue to identify areas for process efficiencies within the Osher office.
- d. Continue to review and update documentation of policies and procedures as needed.
- e. Initiate a fundraising campaign for classroom furniture purchases.
- f. Stay abreast of potential space within the campus buildings that Osher could potentially use.
- g. Identify appropriate curriculum accessible for evening and Saturday scheduling.
- h. Review and update documentation as needed.

Management

Director, Assistant Director, Staff, and Dean of Extended Studies

Performance Metric

- a. Number of classes in alternative locations and/or delivery times.
- b. Annual evaluation of staff with performance goals, achievement, and satisfaction.
- c. Replace tables and chairs in classroom 510 and chairs in lecture hall 207.

5. Technology – Whether pertaining to online registration, member communication, or course delivery methods, technology in general and at Boise State University constantly changes and improves. The Osher Institute relies on advances in technology to enhance the member, instructor, and staff experience. Staffing needs may increase as programs expand and new technologies are incorporated and managed.

Goals

- Increase members' use of their Osher account online for registration and access to course materials.
- Improve members' response and participation in online evaluation system for assessing their satisfaction with program content, organization, and facilitation.
- Explore new equipment and software options to provide high-quality delivery of programs and increase ability to record both in-person and hybrid presentations.
- Improve accessibility for members with visual, auditory, or physical barriers for better enjoyment of programs.
- Maintain and update office and classroom equipment as needed.

Strategies

- a. Develop tutorials and schedule workshops hosted by staff and Osher volunteers to assist members in accessing online accounts to improve independent membership renewal, registration, and ability to access links within them.
- b. Identify new technology including cameras, software, and microphones to improve recording of Osher programs.
- c. Explore updated hearing devices and other equipment to improve accessibility for members.

- d. Keep abreast of and use University resources to enhance accessibility for members with hearing, sight, and mobility impairment.
- e. Maintain a timeline for upgrades and replacements of computers and equipment for Osher office and classrooms.

Management

Assistant Director, Osher Staff, and University Resources

Performance Metric

- a. Measure ROI on investments in technology both in terms of member satisfaction on program experience and attendance numbers in specific types of livestream and hybrid programs.
- b. Measure cost of investments and utilized upgrades annually.

CONCLUSION – WORKING THE PLAN

This Strategic Plan continues and builds upon a previous vision of growth for the Osher Lifelong Learning Institute for the coming years. Using the Strategic Plan as a “living document” will provide ongoing direction to new heights, best practices, and sustainable visions for the Osher Institute. Many of the initiatives and goals, as well as strategies and matrices, are already in effect; all others will be implemented upon approval of the Strategic Plan by the Osher Institute Director and the Dean of Extended Studies. The Osher Institute Advisory Council will provide a final review and contribute any additional suggestions prior to the implementation of the Strategic Plan. Upon implementation, the Director and staff of the Osher Institute will focus on the identified goals and establish routine reviews to track outcomes in alignment with the Division of Extended Studies. Upon approval, this Strategic Plan will be made available to the Osher membership and the public via the Osher Lifelong Learning Institute website.

Resources and references used in the development of the Strategic Plan include the S.W.O.T. worksheet (below). Additionally, the plan used information from the Osher Institute NRC Survey Comparisons (2014, 2016, and 2018) worksheet, FY20 Annual Osher Institute Goals, and Program Prioritization (2014) and Update (2019) results. The latter documents are available for review upon request.

STRENGTHS, WEAKNESSES, OPPORTUNITIES, AND THREATS *2022 NRC Survey **Osher Institute Data from 2024 Program Prioritization & FY24 Goals

STRENGTHS	
Demand	The Osher Lifelong Learning Institute is popular.
Growth	Significant annual growth in membership in 2024. Between 2014 & 2020, membership grew but declined mid-2020 due to pandemic. The current upward trajectory is positive.

High-Quality Curriculum	Known for high-quality and diverse curriculum taught by highly skilled presenters.
Favorable Reputation	Local leader in non-credit, college-level lifelong learning for adults over 50; part of a known national identity; prestige in being a member or instructor; local organizations happy to display Osher catalogs.
Members	Remarkable lifelong learners who are well educated, curious, and supportive. 2022 Survey reflects more than 90% of Osher members hold educational degrees. *
Customer Services (CS) Staff	Members and instructors are very satisfied with the level of customer service they receive. The Osher Institute benefits from ancillary support of the CS team, which advocates and works hard to make improvements to the registration system and process.
Osher Foundation	Endowments can be used to offset expenses that would otherwise be paid through higher course/membership fees. Osher Foundation hosts a national conference, with no charge for lodging and conference fees, for directors and one volunteer. The NRC provides networking and learning opportunities between directors and other Osher staff to identify best practices.
Advisory Council Volunteers	Actively engaged Advisory Council, committees, and other volunteers are devoted to the Institute's success; collaborate well together; share time, expertise, and advocate for lifelong learning; and provide peer-to-peer interaction with members.
Face-to-Face Education	Provide personal connection with instructors/presenters, members, staff, and administration and access to subject experts and community leaders that members would not otherwise have.
Fundraising	The sustainable fundraising program has grown each year and currently enjoys 25% of member participation. The national average in Osher Institutes is 17%.
Osher Staff	Highly professional and dedicated staff deliver excellent customer service and are committed to member and instructor needs as well as the Institute's mission.

Affiliation with Boise State	<ul style="list-style-type: none"> ● Part of a strong local brand. ● Showcase University excellence to a distinguished community of lifelong learners, new arrivals, opinion leaders, donors, and potential donors. ● Dean of Extended Studies advocates for the Institute to Boise State and the community. ● In-kind provision to Osher for classroom and office space. ● Access to ancillary services for annual fees. ● Administrative University services provided (e.g., IT, facilities, maintenance, security, Foundation, and HR).
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Osher National Resource Center (NRC)	Provides access to resources through NRC and network affiliation with other Institutes nationwide; monthly webinars and best practice presentations; encourages engagements between directors; uses a software program uniquely designed for sharing documents, materials, and projects between Institutes and the NRC.
Venue	Yanke building is conveniently located and is a beautiful facility in a park-like setting, with well-appointed classrooms and accessible parking.
Capacity	With the addition of livestream and recording options, the Institute has minimal waitlists for programs, and thus far in 2024, no lottery has been implemented for seating members.

Technology	High-quality equipment in classrooms to enhance accessibility for visually or auditorily impaired members.
Presenter Pay	A sustainable business model allows Osher to pay instructors, unlike local community education programs and approximately half of other OLLIs, which rely on mostly volunteer instructors. Locally, our rates are well respected.
Retention	Retention has been positive in 2023 and 2024; this remains a high priority in connecting with members to encourage return in future membership years.
Strong Relationships	Effective relationships with community and campus departments to recruit a diversity of qualified presenters.
Financial Structure	Through good stewardship of resources, popular curriculum, and the sustainable annual fundraising program, the Osher Institute is on solid financial ground.
Fundraising	25% of the membership currently contributes to the Osher Excellence Fund annually.
Demographic	Our demographic is appealing to certain community partners willing to philanthropically support the Institute.
Volunteer Opportunities	Volunteer opportunities continue to expand under a new organization of the Volunteer Committee and staff liaison. Volunteer Orientations and Information Sessions cultivate opportunities for new members to become more involved in the Institute.

Weaknesses	
Growth	Recovering from membership decrease from 2020 has been a continuing challenge. In 2024, some recovery has been noted.
Aging Membership	Surveys indicate our membership is aging, which can impact need for additional resources. Currently 75% of Osher members are between ages 65-79. *

Facility Space	Program will need additional space, but none has “officially” been identified.
Staffing	As programs evolve and membership returns to higher levels, staff workload will also increase and require adjustment.

Diversity	Membership is not as broad as desired. While demographics in race/ethnicity mirror Idaho and Boise in general, there is a need to seek out additional communities for inclusion.
Younger Members	Only 8% of members are between 50-65. Nationally, other Osher Institutes experience this same aging issue. Younger demographics are not actively seeking out Osher programs in anticipation of retirement activities.
Registration Method	Some members are challenged by online registration, although more than 80% of members are using the system currently. Those who are less comfortable with technology still utilize in-person, telephone, and paper registration methods.

Opportunities	
Registration Software Limitations	Registration software is affordable but limited. Several additional services have been recently expanded to include member accounts that will house program recording links and livestream links for easier access. This will also reduce staff time in manually providing these items to individual members.
Instructor Capacity	Expanding access to speakers of high caliber has been and will continue to be possible as hosting livestream programs increases. The Institute is experimenting with invitations to popular non-resident speakers to visit Boise and provide in person programs for members. This serves as a high-demand response to member requests to meet these speakers and is also a means of improving revenue.
Treasure Valley Growth	Population increase of retirees and new Boise residents will continue to be a resource for the future. Boise State retirees are invited to join Osher with a free one-year membership gifted to each. The Institute could explore other high-level community organizations who might value a membership upon retirement.

Fundraising	Many opportunities exist to enhance fundraising with the revised committee (previously finance committee) to explore fundraising opportunities.
Volunteer Opportunities	Continue to identify new or enhanced ways to use members who want to engage. A strong volunteer corps provides added engagement for members, can reduce staff workload, and help build a strong pipeline of advocates and supporters.
Fee Structure	Membership fees were adjusted in FY25. Will consider adjustments every five years while exploring additional membership levels to include “all inclusive” or “livestream only.”

Technology	As technology changes, new opportunities for enhancement are available. This could include an Osher app for mobile use or smart TVs.
Accessibility	As the number of members who need assistance to effectively access programs increases, the Institute can benefit from changes in state/organizational standards.
Change in University Leadership	Appointment of new president could affect the Institute through administrative and/or financial changes in a positive way.
Expansion to Other Locations	With livestream capacity, a marketing plan should include membership drives for a “livestream only” option to benefit other communities around the state such as McCall, Ketchum, and Twin Falls.

Threats	
Registration Software Limitations	Desired software improvements may not be possible.

Change in University Leadership	Appointment of new president could affect the Institute through administrative and/or financial changes in a negative way.
Competition	Just as “The Renaissance Institute” was begun, a competing program could evolve.
Aging Membership	Survey indicates we are aging, which can impact accessibility needs and recruitment of younger members. Currently 75% of Osher members are between ages 65-79.*
Accessibility	Increased number of members needing assistance.
Facility Space	Limited space in the Yanke Building to meet new growth beyond a membership of 2,500.
Expenses	Salary/benefits and other expenses are on the rise.
Registration method	Considered difficult by some. Currently offering online, in-person, and telephone options for renewal of membership and registration.