

## Executive Summary

### Recommendations of the Membership Roundtable to the OLLI Leadership Council April 20, 2022

The Membership Roundtable came together for five meetings February through April 2022 at the recommendation of the Leadership Council to assess the dynamics of the drop in membership and provide recommendations for its growth and enrichment.

The Roundtable was guided by its goal **to recommend organizational design and practices that produce and maintain net gain in a diverse OLLI-UM membership on an annual basis.**

Membership data from 2012–2022 were reviewed. The following demographics were stable across the 10 years:

- The total of persons from all diverse communities represents only ~ 2% of membership
- Caucasian women represent ~ 70% of the membership
- ~50% of members have joined as a result of word of mouth or friend invitation
- Approximately 35% report income of \$75,000 to over \$100,000

Also reviewed were data of membership gains and losses over ten years, participation rates of each member for the last three years and breakdown of free events over the last three years. Appendix A shows all data reviewed.

Discussion of reasons for member loss during the last 18 months in particular was generally anecdotal as time prevented development of a systematic survey to all 900+ lapsed members. Restrictions of the pandemic and resultant changes to member behavior related to the pandemic were thought to prevail. Examples of OLLI not being a welcoming community surfaced, however, as well as proliferation of external programming that is free and focused more on current events and active participation. Final recommendations emerged from two premises of the discussion:

<sup>1</sup>Recognize and celebrate that OLLI-UM is an organization that brings satisfaction to many members

<sup>2</sup>Accept and internalize that potential members of color, gender and reduced economic means may not find OLLI-UM a welcoming place.

Recommendations:

1. Enact an immediate and active *Membership Campaign* to bring new members and lapsed members into an organization in the process of revitalization after several years of pandemic restrictions and leadership transitions.
2. Establish *Membership Forward*, an 18-24 months plan to achieve a membership enriched by the inclusion of persons from currently underrepresented groups.
3. Authorize formation of a Standing Committee that addresses the member experience through strategic communication and marketing strategies.
4. Conduct an evaluation of member experience with the catalog, Friday e-blast and website and make changes in line with evaluation responses.