



Strategic Plan

Client: Osher Lifelong Learning Institute at USF (OLLI-USF)

Communication Objectives:

- To increase awareness among Tampa seniors about OLLI-USF's mission from a mean of 1.49 to 3.0 by March 2009.
- To enhance development efforts through the creation of marketing materials.
- To increase financial contributions to OLLI-USF from approximately \$10,000 annually to \$15,000 annually by March 2009.
- To maintain OLLI-USF's 20 existing community partnerships and forge five new ones by March 2009.

Creative Strategy Statement

Audiences:

Prior research identified two primary audiences:

1. Seniors, 50+, living in the Tampa community who are interested in lifelong learning. These individuals are educated with at least one college degree and have the desire to interact with peers and stimulate their minds. Minorities, particularly African-Americans and Hispanics, are of special concern due to the organization's lack of ethnic diversity.

2. Potential donors, both individuals and business entities, in the Tampa community. These donors may have a vested interest in this age group (i.e. insurance companies, lawyers, doctors, etc.) or be interested in contributing to a unique cause as opposed to other traditional charities.

Competition:

OLLI-USF's biggest competition is USF Continuing Education and to a much lesser extent, OLLI-Eckerd in St. Petersburg, FL. There are other adult learning programs in the greater Tampa and Hillsborough County area, sponsored by the University of Tampa, Hillsborough Community College and the Adult and Community Education Program within the School District of Hillsborough County. However, there are no other local senior learning communities, giving OLLI-USF a distinct advantage over their competition with this age group.

Key Benefits:

- OLLI-USF offers a range of classes taught by knowledgeable volunteer instructors with a passion for teaching and learning. Class topics are diverse so people of all educational and cultural backgrounds can find something of interest to them.
- OLLI-USF is a close-knit community of active seniors who are excited about life and education.
- Membership includes numerous benefits and is relatively inexpensive in comparison to other continuing education programs.
- The social interaction and intellectual stimulation help seniors resist the depression and apathy that often accompany aging.

Strategies and Tactics:**“The Best is Yet to Come” Campaign**

This strategic public relations plan will provide OLLI-USF with the necessary communication tools to increase minority enrollment and improve development efforts. This campaign will be implemented over a one year period, from March 2008 through March 2009.

1. Primary Audience: Tampa seniors, 50+

Strategy: To create awareness of OLLI-USF and the benefits of lifelong learning within this target public, and increase enrollment of minority members.

Tactics:

- **Public Service Announcement (60 seconds)**

Implementation Date: To be aired March 2008 – March 2009

See attached proposal

Purpose: The PSA will utilize the broad appeal of television to reach the target public and the community at large. PSAs are free to air, and considering OLLI-USF's limited budget as a non-profit organization, this is an effective and economical way to create community awareness.

- **Informational pamphlet for general and community distribution**

Implementation Date: Ongoing

Purpose: This marketing piece will create awareness and understanding of OLLI-USF and its mission to provide quality lifelong learning while emphasizing its commitment to cultural diversity. It can also serve as a recruitment tool at OLLI-USF and in the Tampa community.

- **OLLI-USF Senior Expo**

Implementation Date: August 16, 2008

This public event will gather local organizations and businesses to provide information and instruction on a variety of subjects relevant to senior living, including healthcare, nutrition, financial matters, real estate, lifelong learning, and travel and leisure activities. Local businesses, organizations and vendors can sponsor booths at the expo with proceeds benefiting OLLI-USF. The event may also feature speakers on special topics of interest to seniors, ranging from politics to technology.

Purpose: The event will serve as a public forum to promote lifelong learning and active senior living to the local community. More importantly, it will facilitate the formation of business and community partnerships for OLLI-USF, thereby increasing awareness of the organization within a valuable local network and garnering lucrative sponsorships. Since

the event is open to the public, it will also attract a diverse range of people, including minorities.

- **Promotional Items**

- Implementation Date: Ongoing**

- A “student supply bag” containing a notepad, pen and folder; also, magnets, golf tees and golf balls featuring the OLLI-USF logo and the campaign tag line, “The Best is Yet to Come.”

- Purpose:* These promotional items will create brand awareness among current and potential members, and within the local community. They can also serve as gifts for volunteers and donors.

- **Community Media Placements**

- Implementation Date: Sept. 2008 – March 2009**

- Use student work from Life Story Writing classes and rework into short features for placement in community magazines, newspapers and newsletters. Also, develop feature stories about members with interesting backgrounds or expertise. Brief mention of OLLI-USF in these stories will help promote the organization and the importance of lifelong learning to senior readers.

- Purpose:* Placing these feature stories in various community media will create awareness about OLLI-USF and lifelong learning among active senior readers. In addition, it will publicly recognize seniors’ achievements and experiences, providing extra incentive for OLLI-USF members to participate while positively shaping popular perception of this age group.

2. Primary Audience: Potential donors

Strategy: To raise awareness of the importance of lifelong learning and inform potential donors of the benefits of donating to OLLI-USF versus other organizations.

Strategy: To strengthen donor relations both before and after a donation is made.

Tactics:

- **Development brochure for potential private and business donors**

Implementation Date: Ongoing

This piece will serve as the primary tool for soliciting donations. Through effective copy and design, it will address the following key points: 1) provide information about OLLI-USF, 2) explain the benefits of supporting lifelong learning, and 3) detail how financial contributions directly impact the organization.

Purpose: This brochure will provide OLLI-USF's development committee with effective marketing material to offer to potential donors when soliciting donations. It will also lend legitimacy and professionalism to the organization and its cause, which can lead to increased donor confidence.

- **Friends of OLLI Program**

Implementation Date: Ongoing

Donor incentives; upon donating, individual and business donors will be named a "friend of OLLI" and receive a special framed certificate of recognition and OLLI-USF promotional items. OLLI-USF will recognize Friends of OLLI at organizational events, such as an annual awards banquet.

Purpose: This program will offer incentives to potential donors to contribute to OLLI-USF, most important of which is community involvement and recognition.

- **Interactive Sponsorships**

Implementation Date: Ongoing

Solicit local businesses to sponsor OLLI-USF activities or classes by providing materials, resources, transportation, etc.

Purpose: As a way to circumvent USF's restrictions on fundraising, OLLI-USF can engage in mutually beneficial partnerships with donors without accepting financial

contributions. OLLI-USF can reduce spending and program costs through these in-kind donations while the donor gains access to a targeted group of consumers.

Public Service Announcement
“The Best is Yet to Come”
60 seconds

Purpose:

To create awareness about the importance of lifelong learning in the Tampa community, especially among seniors.

Treatment:

The PSA will feature a black and white montage of OLLI-USF members speaking on how OLLI-USF and lifelong learning has changed their lives. These sound bites will be assembled to reflect the campaign’s theme while the song, “The Best is Yet to Come,” plays in the background.

At the beginning of each interview, participants will repeat the following two statements to reinforce the campaign’s key themes and messages:

1. My name is _____ and because of lifelong learning, I believe the best is yet to come.
2. Retirement isn’t an end; it’s a beginning.

Next, each participant will be asked to answer the following three questions for the purpose of gathering useful sound bites:

1. What is the best part about being a member of OLLI-USF?
2. What do you enjoy most about lifelong learning?
3. How has OLLI-USF and lifelong learning changed your life?

Production Plan:

Week of Nov. 12 – Filming

Week of Nov. 26 – Editing

Dec. 4 – Video preview with Dr. Werder