PLATO

Participatory
Learning
And
Teaching
Organization

Where love of learning never gets old

PLATO Strategic Plan
2017-2020

December 8, 2017
Approved by the PLATO Board of Directors

Amended, December 14, 2018

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Letter from the Board President

To PLATO Members, Coordinators, and Volunteers:

This year, 2017, we celebrate PLATO's 30th anniversary. In those 30 years PLATO has grown from a handful of dedicated members, who created a highly functional model of peer teaching and learning, to an organization approaching 1,300 members providing a broad array of course offerings and special events.
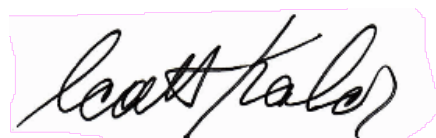
The combination of steady growth in membership and the prospect of sustained future growth created the need for the organization to examine its strengths, weaknesses, and priorities. To address those concerns the PLATO Board of Directors initiated a strategic planning process of which this document is the result.

The PLATO Board of Directors is pleased to provide you this copy of PLATO's 2017-2020 strategic plan. Within these pages you will learn about our mission for the future and the key areas that we will focus on for the next several years to help enact that mission. In a time of great demographic change in the greater Madison area and an expanding interest in life-long learning, this strategic plan provides PLATO a path toward a strong, dynamic, and responsive future for the organization that meets the needs of its members.

The strategic priorities and goals that you see in these pages are the results from a comprehensive effort by the Board that explored the future needs of our members. A planning committee appointed by the Board led an intensive process that included surveys of members and course coordinators (those who teach for us) and two half-day planning events that sought to leverage and integrate the survey results with the insights from PLATO's leaders past and present, course coordinators, and active members.

The resulting plan contained within these pages charts a path for PLATO into the future. We look forward to your joining us on this journey by helping move our plan forward through volunteering your time teaching/coordinating, assisting on various committees, or being an active member participating in the courses and events we offer and letting others know about us.

Thank you for being part of PLATO today and into our future!

Scott Kolar, 2017-18 Board President

Executive Summary

The situation we face and why we needed a strategic plan

- PLATO has grown organically without active membership recruitment and we expect that growth to continue for the foreseeable future.
- Growth has strained our capacity to provide programming and administer the organization.
- Surveys have shown that the membership is very satisfied with the programming that PLATO offers.
- The surveys have also indicated that we need to do a better job of communicating who we are, what we stand for, what our needs are, and how to meet them.
- PLATO has a strong tradition of all volunteer programming and the membership is strongly in favor of continuing that tradition.

Fundamental principles

- We will provide programming to match our growth, rather than trying to manage growth.
- Programming will remain an all-volunteer effort.
- No goal has been set to increase general membership.
- We may conduct targeted membership recruitment to achieve specific organizational goals.

Focus of the strategic plan

- The primary focus of strategic plan is to "right size" organizational capacity to meet membership changes through volunteer recruitment and administrative capability.
- Membership activities will be geared toward communicating PLATO's need for member volunteers and to identify and recruit members to participate in areas where volunteers are needed.
- While it is desirable that administrative needs be met by volunteers, members may not have the needed skill sets, time, or inclination to perform all tasks needed to keep PLATO running smoothly.
- When the need for additional administrative capacity arises we will address the need in the following order:
  - PLATO member volunteer
  - UW-Madison Division of Continuing Studies (DCS) provided resources
  - Outside contractors
- Meeting administrative needs in a timely manner will take priority over securing volunteer or DCS resources.

PLATO Mission and Core Value

Mission

PLATO, the *Participatory Learning and Teaching Organization*, is a learning-in-retirement organization that relies on active member involvement to develop and provide participatory learning, teaching, and social opportunities for members. PLATO also financially supports educational opportunities for learners of all ages in greater Madison. PLATO provides these services in association with the University of Wisconsin-Madison.

Core Value

Be an inclusive and welcoming organization to all members of the greater Madison community who wish to continue learning and/or teaching in retirement.

PLATO's Strategic Agenda

1.   *Enhance the Member Experience as a Pathway to Participation*

> Maximize member engagement by communicating information, building organizational awareness and underscoring opportunities.

2.   *Ensure that PLATO is an Organization that Welcomes and Respects People from Varied Backgrounds and with Different Opinions*

> Provides a welcoming and respectful environment that promotes learning about a wide variety of perspectives and experiences.

3.   *Build & Strengthen the Volunteer, Leader & Coordinator Experience*

> a. Develop a program and system for recruiting, developing, engaging, and retaining volunteers.
>
> b. Create a process for identifying and developing leaders.
>
> c. Develop a program to enhance and support the experiences of course coordinators.

4.   *Build Administrative Capacity*

> a. Provide sufficient resources, whether volunteer, staff, or contracted services to adequately support PLATO's programmatic, administrative, and financial functions.
>
> b. Develop a process for clear, consistent, and timely decision-making across the organization.

Issue #1: Enhance the Member Experience as a Pathway to Participation

Rationale: When members have a good understanding of PLATO's mission and values, they will actively engage in the organization.

Goal: **Maximize member engagement through information, awareness and opportunity.**

Desired Outcomes: New members report satisfactory understanding of PLATO and make informed decisions about additional participation.

Measures of Success: Surveys of new members evaluate satisfaction and number of multiple PLATO touchpoints per member increases.

Goal Champion(s):

Action Strategies to Achieve the Goal:

Target Date for Goal Completion		
Actions to Achieve the Goal	**When?**	**Who?**
Create a new members information/orientation program.		
Develop member recognition mechanisms.		
Evaluate the effectiveness of current communications and recommend modifications and enhancements.		

Issue #2: Ensure that PLATO is an Organization that Welcomes & Respects People from Varied Backgrounds & with Different Beliefs

Rationale: PLATO exists within a larger community that has a variety of racial, ethnic, cultural, political, and religious traditions. As an organization that values learning, PLATO has an obligation to promote an environment that respects these traditions, honors multiple viewpoints, and promotes learning about a broad variety of experiences.

Goal and Desired Outcome:	PLATO will provide a welcoming and respectful environment that promotes learning about a wide variety of perspectives and experiences.

Measures of Success:

Issue #3:   Build & Strengthen the Volunteer, Leader & Coordinator Experience

Rationale: PLATO is a growing organization which relies almost exclusively on volunteers. In the absence of sufficient volunteers, the organization will either need to cut back on programs that are highly valued by its members or hire additional staff or contract for services.

Goal #1   Develop a program and system for recruiting, developing and retaining volunteers.

Desired Outcomes: PLATO has a dedicated, ongoing strategy and program to recruit, develop and retain volunteers.

Measures of Success:

    a. Sufficient volunteers are recruited on an on-going basis to fill all needed positions.

Goal Champion(s):

Action Strategies to Achieve the Goal:

Target Date for Goal Completion			
Actions to Achieve the Goal		**When?**	**Who?**
Establish an ad hoc committee to develop a written plan for recruitment, development and retention of volunteers and to recommend any organizational changes needed to implement the plan on an on-going basis.			
The Board will review and implement the recommendations of the ad hoc committee			

Goal #2   Create a process for identifying and developing leaders

Desired Outcomes:

    a. There is a stable base of committee members that provides a pool of future committee chairs, board members and officers to ensure orderly turnovers and meet the needs of a growing membership.

    b. An orientation/mentoring program is in place to help leaders transition to their new roles.

    c. There is a method to ensure that workloads are reasonable.

    d. Time spent in meetings is deemed productive by those in attendance.

Measures of Success:

   a. A steady supply of members is willing to step into leadership roles.
   b. A sufficient pool of qualified members is available to fill open leadership positions whether due to regular or unexpected turnover.
   c. Leadership turnover is not due to overwork, lack of resources, or lack of recognition.

Goal Champion(s):

Action Strategies to Achieve the Goal:

Target Date for Goal Completion			
Actions to Achieve the Goal		**When?**	**Who?**
Develop a communication strategy to improve member knowledge of leadership opportunities and duties.			
Provide support for committee chairs.			
Provide increased support for board leaders.			

Goal #3	**Develop a program to enhance and support the experiences of course coordinators**

Desired Outcomes:

   a. The number of course coordinators is commensurate with membership growth.
   b. There is a stable base of course coordinators and coordinators express positive views about their coordinating experience.

Measures of Success:

   a. Members continue to express high satisfaction with course offerings.
   b. The number and variety courses are sufficient to meet membership demand.
   c. Coordinator turnover is not excessive.
   d. Coordinators express satisfaction with their experience.

Goal Champion(s):

Action Strategies to Achieve the Goal:

Target Date for Goal Completion		

Actions to Achieve the Goal	When?	Who?
Develop a coordinator database with information on courses offered, years coordinating, and additional interests. This information would be used in planning.		
Thoroughly review the results of the coordinator survey and identify areas/issues needing additional information. If warranted, hold a focus group with willing coordinators and the curriculum committee to identify needs/plan improvements.		
Develop an ongoing communication strategy to encourage members to serve as coordinators.		
Develop additional strategies for recognizing coordinators.		
Monitor need for additional support to assist curriculum committee leadership as course numbers increase and more sites are used.		

Issue #4: Build Administrative Capacity

Goal #1	Provide sufficient resources, whether volunteer, staff, or contracted services to adequately support PLATO's programmatic, administrative, and financial functions.

Rationale: Having an adequate administrative infrastructure is critical to delivering quality services to members.

Desired Outcomes:

a. Administrative functions are performed in a consistent and timely manner.
b. Personnel turnover does not disrupt the delivery of member services.
c. The administrative infrastructure is adequate to meet organizational needs.
d. A strong volunteer culture is promoted and maintained.
e. Excessive workloads do not cause staff and volunteer turnover.

Measures of Success:

a. The unexpected loss of any individual does not excessively disrupt the operation of the organization.
b. Organizational processes are adequately documented.
c. Committees have clear directions, and sufficient resources to support their mission.
d. Workloads are managed and adjusted to prevent unrealistic expectations, and support is provided as needed to mitigate turnover.

Goal Champion(s):

Action Strategies to Achieve the Goal:

Target Date for Goal Completion			
Actions to Achieve the Goal		**When?**	**Who?**
Regularly evaluate staff capacity with respect to program expectations.			
Establish a process in which new initiatives or significant expansion of programs are evaluated for their impact on staff, volunteer, and financial resources.			
Establish and maintain a task inventory of committees, board, and staff needs			
Implement a mechanism for matching member interests and expertise to organizational needs.			

Goal #2   Develop a process for clear, consistent, and timely decision-making across the organization.

Desired Outcomes: Board members, Committee Chairs and Committee members understand the scope of their respective decision making authority.

Measures of Success: Committees know the scope of their decision making authority and know which decisions should be referred to the Board.

Goal Champion(s):

Action Strategies to Achieve the Goal:

Target Date for Goal Completion			
Actions to Achieve the Goal		**When?**	**Who?**
Establish, communicate, and promote adherence to decision making guidelines.			
Develop criteria to evaluate the need for additional capacity.			
Develop procedures to promote timely decision making.			
Develop effective data collection and analysis to support decision making.			
Develop enhanced communication mechanisms for committees to keep the Board apprised of major issues.			