

Charter:

OLLI SF State Membership Engagement and Retention Committee **(MERC)**

I. Goal

The goal of the Membership Retention and Engagement Committee (MERC) is to assist the OLLI Director in the development and identification of programs and age-friendly experiences that add value to OLLI membership and that improve member retention and engagement. MERC is committed to promoting OLLI as an organization that emphasizes not only lifelong education, but also personal enrichment, learning for the joy of learning and forming new and lasting friendships.

MERC will work with the Marketing Committee, the OLLI Director, and the Council to develop and implement key strategies necessary to retain current OLLI memberships as well as enhance the membership experience.

II. Responsibilities

MERC works closely with the Marketing Committee in all aspects of meeting its goals. All strategies for meeting the responsibilities within the scope of MERC are subject to approval, first by the OLLI Director and then by the Council.

To successfully accomplish its purpose, MERC's key responsibilities include:

- Leading the development of a fiscal-year work plan for the implementation of key strategies for membership retention and engagement. This plan will be presented to the Director and the Council at the beginning of each fiscal year.
- Developing an annual budget for membership activities.
- Suggesting ideas for membership retention:
 - Identifying the needs of members and recommending ways to develop services to meet those needs.
 - Identifying and implementing ways to make current members aware of resources, services, and benefits of OLLI membership.
 - Recommending ways to acknowledge new members and encourage their participation in OLLI activities.
 - Creating engagement opportunities for existing OLLI members through volunteer activities.

- Coordinating and collaborating with other OLLI committees that support activities related to MERC's goals and responsibilities.
- Proposing strategies for re-engaging members who have lapsed for less than one year. (Outreach to individuals with memberships that have lapsed more than one year will be the responsibility of the Marketing Committee.)

III. MERC Structure and Process

MERC shall have monthly meetings. The committee will be chaired by a member of the OLLI Council. Alternatively, if no Council member is on the committee, the Council will appoint a chair of MERC who will also serve on the Council.

- The chair of MERC will also be responsible for:
 - sending out an agenda with supporting materials, if any, several days in advance of each meeting and
 - setting the tone and leading committee meetings to ensure success of its goals.
- A vice-chair shall be named to assist the chair and act on the chair's behalf when the chair is not available.
- One member of MERC shall serve as recorder.
 - The recorder will take minutes and distribute them for review within one week of monthly meetings. Once finalized, the minutes will be a summary of the key action items to be presented to the Council at the Council's monthly meeting.

IV. Eligibility and Tenure of MERC Members

Members of MERC shall represent as broadly as possible all OLLI constituencies. MERC members will be committed to the mission of OLLI and be interested in and willing to apply their skills and experience to advance the overall goals of the committee. All dedicated volunteers are welcome, but individuals with expertise in working with member retention and/or member experience programs are particularly needed.

To be eligible to serve on MERC, an OLLI member must:

- have been an OLLI member for at least one year,
- be a course-taking member,
- be willing to make a one-year commitment to serving on the committee, and
- to participate regularly at meetings.

- At the start of each calendar year, members will be required either to recommit to the committee or to resign. Members may be replaced after three absences in a 12-month period.

MERC members are expected to prepare for and attend the regular monthly committee meetings.

- MERC activities may involve 4–6 hours per month of preparation, planning, and direct volunteer service.
- Each MERC member is expected to take the lead on one goal or objective set by the committee. These responsibilities and the name of the responsible member will be included in the minutes of each meeting on the list of action items.

V. MERC Application and Selection Process

An OLLI member interested in joining MERC will first be invited to attend an MERC meeting as a guest. After attending one meeting, the prospective member should review the membership charter and, if still interested, indicate to the committee chair his or her interest in joining MERC.

- Charter drafted July 17, 2023.
- Redrafted June 2026 to include edits from Kathleen, Lorri, Robert, and Walter.
- Final version approved by MERC, July 8, 2026.